

FACE SHEET
FOR FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

RECEIVED FOR FILING

FEB 28 1956

Division of Administrative Procedure

ENDORSEDAPPROVED FOR FILING
(GOV. CODE 11380.1)

FEB 29 1956

Division of Administrative Procedure

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Copy below is hereby certified to be a true and correct copy of regulations adopted, or amended, or an order of repeal by:

State Department of Social Welfare

(Agency)

Dated: February 28, 1956

By: *George K. Wyman*

Director

(Title)

FILEDin the Office of the Secretary of State
of the State of California

FEB 29 1956

At 12:28 o'clock P.M.

FRANK M. JORDAN, Secretary of State

By *Frank M. Jordan*
Assistant Secretary of State

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W41C 115,116

February 27, 1956

DEPARTMENT BULLETIN NO. 525 (STAT)

TO: COUNTY WELFARE DEPARTMENTS
COUNTY BOARDS OF SUPERVISORS
COUNTY AUDITORS

Subject: Federal Study of Characteristics
of Families Receiving Aid to
Needy Children

The Department of Health, Education and Welfare is conducting a special study of the characteristics of families receiving Aid to Needy Children. Participation is required of all states.

In California, schedules will be completed on approximately 1,500 cases. The required information shall be reported on Form Temp 375 CA in accordance with "Instructions for Form Temp 375 CA, Biennial Study of Social and Economic Characteristics of Families Receiving Aid to Needy Children" for all family cases receiving aid payments in March 1956 and whose state numbers end in 05, 25, and 45.

A supply of schedules and instructions is being forwarded to each county.

Questions regarding the study and schedules should be directed to the State Department of Social Welfare Bureau of Research and Statistics.

The completed schedules shall be sent to the Bureau of Research and Statistics, State Department of Social Welfare, 616 K Street, Sacramento 14, on or before April 9, 1956.

This bulletin shall cease to be effective after May 31, 1956.

Very truly yours,

George K. Wyman
George K. Wyman
Director

These Regulations are designated to become effective APR 1 1956

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State of California

Department of Social Welfare

AID TO NEEDY CHILDREN
BIENNIAL STUDY OF SOCIAL AND ECONOMIC CHARACTERISTICS OF FAMILIES
MARCH 1956

COUNTY _____

State Case Number _____

PAYEE: Name _____
Relationship to Children: 1 Mother 3 Other Relative
(Circle one) 2 Father 4 Nonrelative

Code		Code																																									
A	A _____ (For state use only)	H	H Age of mother, natural or adoptive (circle one): V Deceased 2 30 - 39 0 Under 21 3 40 or over 1 21 - 29 5 Unknown																																								
B	B Amount of ANC grant \$ _____	J	J _____ (For state use only)																																								
C	C Place of residence (circle one): In metropolitan county: In nonmetropolitan county: 0 City of 50,000 or more 4 City of 2,500 - 49,999 1 City of 2,500 - 49,999 5 Other nonfarm 2 Other nonfarm 6 Farm 3 Farm	K	K OASI benefits (circle one): 0 Does not receive benefits 1 Receives benefits Complete items L, M, and N for cases receiving OASI benefits:																																								
D	D Race of payee (circle one): 1 White 3 Indian 4 Other 2 Negro V Mexican 5 Unknown	L	L Number of eligible* children with OASI benefits.																																								
E	E Number of eligible* children in F.B.U. _____	M	M Amount of benefit(s) \$ _____																																								
F	F Composition of family budget unit: <table border="1"><thead><tr><th></th><th>Number</th></tr><tr><th></th><th>Eligible* Ineligible*</th></tr></thead><tbody><tr><td>Children</td><td></td></tr><tr><td>1 Under 6 yrs.</td><td>_____</td></tr><tr><td>2 6 - 12 yrs.</td><td>_____</td></tr><tr><td>4 13 - 15 yrs.</td><td>_____</td></tr><tr><td>8 16 - 17 yrs.</td><td>_____</td></tr><tr><td>16 18 - 20 yrs.</td><td>xxx _____</td></tr><tr><td>0 Parent(s)</td><td>_____</td></tr><tr><td>X Caretaker (other than parent)</td><td>_____</td></tr><tr><td>V Other persons</td><td>_____</td></tr></tbody></table>		Number		Eligible* Ineligible*	Children		1 Under 6 yrs.	_____	2 6 - 12 yrs.	_____	4 13 - 15 yrs.	_____	8 16 - 17 yrs.	_____	16 18 - 20 yrs.	xxx _____	0 Parent(s)	_____	X Caretaker (other than parent)	_____	V Other persons	_____	N	N Wage record on which children's benefits are based (Complete for cases with one or more children entered in Item L): 1 Deceased father 2 Retired father 3 Deceased mother 4 Other (Specify) _____																		
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0 Parent(s)	_____																																										
X Caretaker (other than parent)	_____																																										
V Other persons	_____																																										
G	G Children living with (circle one): Two parents: 1 Natural or adoptive 2 Mother and stepfather 3 Father and stepmother One parent (natural or adoptive): 4 Mother 5 Father 6 Stepparent (no natural parent in home) 7 Grandparent(s) (no parent in home) 8 Other (no parent or grandparent in home)	O	O Duration of assistance (complete for all cases): <table border="1"><thead><tr><th colspan="2">Dates Case Opened</th><th colspan="2">Dates Case Closed</th></tr><tr><th>Month</th><th>Year</th><th>Month</th><th>Year</th></tr></thead><tbody><tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr><tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr><tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr><tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr><tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr><tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr><tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr><tr><td>_____</td><td>_____</td><td>_____</td><td>_____</td></tr></tbody></table>	Dates Case Opened		Dates Case Closed		Month	Year	Month	Year	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
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(Over)

CONTINUATION SHEET
FOR FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

P Characteristics of Fathers of Children Included in this Family Budget Unit

Enter required information on each father whose children are included in this family budget unit, making entries for most recent father on Line 1, for the next most recent father on Line 2, etc.

F A T H E R				Number of Children of this Father Who are Included in Family Budget Unit	
(1) Name	(2) Age	(3) Race	(4) Status	(5) Eligible*	(6) Ineligible*
(Most recent father)					
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					

*For ANC

Codes for Father's Status

	Ever Married to Mother	
	Yes	No
Dead	01	02
Incapacitated:		
In home	11	12
In hospital	13	14
Elsewhere	15	16
Estranged:		
Divorced or legally separated.	21	--
Separated without decree.	23	--
Deserting	25	--
Never married to mother:		
Never lived together	--	32
Lived together less than 3 months	--	34
Lived together 3 months or longer	--	36
Other Status:		
In home	41	42
Deported or excluded.	51	52
Correctional institution.	61	62
Elsewhere	71	72

Codes for Father's Race

White	1
Negro	2
Mexican	V
Indian.	3
Other	4
Unknown	5

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CONTINUATION SHEET
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INSTRUCTIONS FOR FORM TEMP 375 CA
 BIENNIAL STUDY OF SOCIAL AND ECONOMIC CHARACTERISTICS OF FAMILIES
 RECEIVING AID TO NEEDY CHILDREN

Purpose of Report

The Social Security Administration describes the purpose of the report in the following terms: "This report will supply a limited amount of information for one month of each biennium on the characteristics of families receiving Aid to Dependent Children. As the Old Age and Survivors Insurance program is to an increasing extent taking care of children with the father dead, the composition of the families receiving Aid to Needy Children is changing. Current information is needed to indicate reasons for dependency in terms of status of the father and to evaluate the relationship between the Old Age and Survivors Insurance and Aid to Dependent Children programs."

Source of Data

The case record, including the face sheet and related documents, will be the source of data. Entries on the schedule will reflect the family situation that existed at the time the payment for March 1956 was made.

Cases to be Included in Study

Data shall be submitted on Form Temp 375 CA for all family cases receiving an Aid to Needy Children grant in March for March, whose state numbers end in the digits, 05, 25, and 45. This represents a 3 percent sample of the case load.

Submission of Schedules

Send completed schedules to the Bureau of Research and Statistics, 616 K Street, Sacramento 14, to reach that office by April 9, 1956.

General Instructions for Completing Form

In preparing the schedule it is important that all applicable items be completed correctly. Schedules with omissions or inconsistent entries will have to be returned for completion or correction.

INSTRUCTIONS FOR ITEMS

Payee

Name -- Enter full name of payee.

Relationship to Child -- Circle appropriate item to show relationship of payee to the children. If the relationship is not the same for all children, use the relationship common to the greatest number of children; in case of equal division, use the relationship to the youngest child.

County -- Enter the name of the county responsible for authorizing the payment.

State Case Number -- Enter the state number used to identify the case.

Item A. Reserve for state office use.

Item B. Amount of ANC Grant. Enter the amount of the Aid to Needy Children payment made to the family for March 1956. Include county supplementation, if any.

CONTINUATION SHEET
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Item C. Place of Residence. This item is designed to provide data on the number of families and children living in metropolitan and nonmetropolitan counties. It will permit a comparison of the proportion of children receiving Aid to Needy Children in communities that include a large urban area and in other communities. (See attached document "1950 Population of All Incorporated Places and All Unincorporated Places of 1,000 or More in California)."

In Metropolitan County -- One of the items 0 through 3 will be circled for each family who lives in any county which is part of a metropolitan area as defined by the Bureau of the Census. The following counties are part of a metropolitan area: Los Angeles, San Francisco, Alameda, San Diego, Sacramento, Fresno, Marin, Contra Costa, San Mateo, Santa Clara, San Joaquin, Orange and San Bernardino.

- 0 City of 50,000 or more -- Circle if the family lives within the limits of a city, the population of which according to the 1950 census was 50,000 or more.
- 1 City of 2,500 - 49,999 -- Circle if the family lives in a city with a population falling within these limits.
- 2 Nonfarm -- Circle if the family does not live in a city of 2,500 or more nor on a farm as defined in Item 3. This will include recipients living in towns of less than 2,500 population (cities, towns, villages, suburban communities, or open country).
- 3 Farm -- Circle if the recipient lives on a tract of land that would generally be considered a farm. This judgment should provide data comparable with the census population in which each respondent told the enumerator whether he considered the place on which he lived to be a farm. Do not circle if the family rents the house and yard, but has no use of the adjacent land. If in doubt as to whether the place is a farm the following definition from the Census of Agriculture may be used. The criteria in the definition should not be applied, however, to places which are generally considered to be farms, or as not being farms. A farm is land on which agricultural operations are performed. Any place having three acres or more on which the value of agricultural products produced in the preceding year was \$150 or more is a farm. Likewise any place having less than three acres from which the value of agricultural products sold in the past year amount to \$150 or more is a farm.

In Nonmetropolitan County -- One of the items 4 through 6 will be circled for each family who lives in a county which is not part of a metropolitan area.

- 4 City of 2,500 - 49,999 -- Circle if the family lives in a city with a population falling within these limits.
- 5 Other nonfarm -- Circle if the family does not live in a city of 2,500 or more nor on a farm as defined in Item 3. This will include recipients living in places of less than 2,500 population (cities, towns, villages, suburban communities, or open country).
- 6 Farm -- Circle if the family lives on a farm in a nonmetropolitan county. See 3 above for definition of a farm.

Item D. Race of Payee.

- 1 White -- Circle if the payee is white.
- 2 Negro -- Circle if the recipient is a Negro or of mixed white and Negro ancestry.

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- V Mexican -- Circle if the payee is of Mexican birth or ancestry.
- 3 American Indian -- Circle if payee is Indian or of mixed white and Indian ancestry.
- 4 Other -- Circle if the payee is neither white, Negro, Mexican nor Indian as defined.
- 5 Unknown -- Circle if race or ancestry is not known.

Item E. Number of Eligible Children in F.B.U. Enter the total number of children in the Family Budget Unit who were eligible for ANC and for whom a payment was made in March 1956.

Item F. Composition of Family Budget Unit. This item shows the number of children and other persons included in the Family Budget Unit for March 1956. It also shows the ages and eligibility status of the children. The sum of the entries for eligible children should equal the entry in Item E.

- 1-16 Children -- Enter in the appropriate columns the number of eligible children and the number of children ineligible for ANC in each age group who are included in the F.B.U.
- 0 Parent(s) -- Enter the number of parents (natural, adoptive or step-) included in the F.B.U.
- V Caretaker (other than parent) -- Enter "1" if there is a caretaker other than a parent included in the F.B.U.
- X Other Persons -- Enter the number of other persons included in the F.B.U.

Item G. Children living with. Circle the appropriate code to indicate the parent, parents, or person in loco parentis, with whom children are living.

If a parent is in the home, this fact should be shown, regardless of whether or not the parent is the payee. A parent is to be reported as in the home if considered a member of the family by the agency, even though he or she may be temporarily absent for such reason as a short illness or business.

If no parent is in the home, the payee should be reported as the person with whom the children are living.

Where the person with whom the children are living does not have the same relationship to all children, use the relationship that is common to the greatest number of children; in case of equal division use the relationship to the youngest child.

Item H. Age of Mother. Check the appropriate age for mother. If mother is deceased, check code V.

Item K. OASI benefits. Consider a family to be in receipt of OASI benefits if any member of the family budget unit is a beneficiary.

- 0 Does not receive benefits -- Circle if no member of the family budget unit receives an OASI benefit.
- 1 Receives benefit -- Circle if an adult or children in the family budget unit receives OASI benefits.

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Item L. Number of eligible children with OASI benefits. Enter the number of children on whose behalf an ANC payment was made and for whose use a child's OASI benefit was also being paid for the study month. The number entered cannot exceed and may be smaller than the entry for Item E.

The entry will be zero if no benefit is received "for the use" of a child, although a benefit may have been received by an adult in the family budget unit.

Item M. Amount of benefit. Enter the total amount of benefits received by the family budget unit for the month. This will include benefits received "for the use" of the children plus any benefit received by any person included in the family budget unit. Exclude lump sum OASI payments.

Item N. Wage record on which children's benefits are based. Item N is designed to provide a classification of families by status of the parent on whose wage record the children's OASI benefits received during the study month are based. An entry will be made in this item only when OASI benefits are made in behalf of one or more children (cases with one or more children entered in Item L).

Where the wage record on which the benefit is based is not the same for all of the eligible children, circle all applicable items, and write in (opposite the appropriate item) the name of the parent whose coverage made possible the receipt of OASI.

- 1 Deceased father -- Circle if eligible ANC children receive OASI benefits based on the wage record of a deceased father.
- 2 Retired father -- Circle if eligible ANC children receive OASI benefits based on the wage record of a retired father.
- 3 Deceased mother -- Circle if eligible ANC children receive OASI benefits based on the wage record of a deceased mother.
- 4 Other -- Circle if eligible ANC children receive OASI benefits based on the wage record of any parent other than the deceased father, retired father, or deceased mother as specified above (Items N 1-3).

Item O. Duration of assistance. This section records the dates (month and year) aid was granted and discontinued, from the first time the case was opened until the present. From these data it will be possible to determine the net time the family has been on aid.

Under "Dates Case Opened" enter the date of original approval and dates of all subsequent approvals (restoration and reapplication) except approvals following discontinuance to adjust for overpayment.

Under "case closed" enter the dates of all discontinuances except discontinuances to adjust for overpayment.

If additional space is needed continue the chronological record on a sheet of paper and staple it to the schedule.

Item P. Characteristics of Fathers of Children Included in this Family Budget Unit. This item shows the age, race and status of the father(s) of the children included in this family budget unit. It also shows the number and eligibility for ANC of his children who are included in the family budget unit.

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(Pursuant to Government Code Section 11380.1)

When there has been more than one father, record the information for each father, starting with the most recent father and working back to the first father.

Column 1 - Name -- Record name of each father.

Column 2 - Age -- Enter the age of each father in years. If father is deceased, write in "dead." If the father's age is unknown, write in "unk."

Column 3 - Race -- Enter the appropriate code to show the race of each father.

Column 4 - Status -- Enter the appropriate code to show the status of each father.

These codes are designed to reflect the reason the children are deprived of the father's support as well as the marital status of the father in relation to the mother of the children.

For fathers not "estranged" it is necessary to choose one of the two codes listed at the right. For example, if the father is dead and had been married to the mother at some time use Code "01," whether or not they were subsequently divorced or otherwise separated. If the dead father was never married to the mother use Code "02."

(A "common-law" union is to be regarded as a marriage only if it was entered into in a state or country which recognizes such relationships as legal.)

For fathers classified as "estranged" (Codes 21 - 36) the code indicates both the reason for deprivation and marital status.

01 or 02 Dead -- Use one of these codes if the father is dead.

Incapacitated -- Use one of the following codes if the child is deprived of support or care by reason of the physical or mental incapacity of the father.

11 or 12 In home

13 or 14 In hospital or sanatorium

15 or 16 Elsewhere

Estranged -- Use one of these codes if father is estranged from the family. Note that if imprisonment (for failure to provide or other reasons) occurred after the father was estranged, the appropriate code showing estrangement should be entered (Codes 21 through 36). If the father was not estranged at time of commitment, then Code 61 or 62 should be used.

21 Divorced or legally separated -- The parents are divorced or legally separated.

23 Separated without court decree -- The married parents have separated but there has been no divorce or legal separation. This does not include cases in which the father has willfully deserted the family.

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25 Deserting -- Use this code if the married father has willfully deserted the family.

Never Married to Mother

32 Never lived together -- Use this code if the estranged unmarried parents never established a household and maintained a family relationship.

34 Lived together less than 3 months -- Use this code if the estranged unmarried parents established a household and maintained a family relationship less than 3 months.

36 Lived together 3 months or longer -- Use this code if the estranged unmarried parents established a household and maintained a family relationship for 3 months or longer.

Other Status

41 or 42 In home -- Use one of these codes if the father is in the home and codes 11 or 12 do not apply. These will primarily be fathers recently returned to the home for whom a period of continued aid is permitted to assist in the rehabilitation of the family.

51 or 52 Deported or excluded -- Use one of these codes if deportation or exclusion is preventing the father from living with the family. If deportation or exclusion followed estrangement enter appropriate code 21 through 36.

61 or 62 Incorrectional institution -- Use one of these codes if the family relationship was interrupted by imprisonment (prison, jail, road camp, etc.). If imprisonment occurred after estrangement, use appropriate code 21 through 36.

71 or 72 Elsewhere -- Use one of these codes if none of the foregoing apply.

Columns 5 and 6 - Number of children of this father who are included in family budget unit -- Enter in the appropriate columns (eligible and ineligible) the number of each father's children included in the family budget unit.

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OR FILING ADMINISTRATIVE REGULATION WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

2041C 103.1

R E S O L U T I O N

WHEREAS a joint committee of counties and departmental staff has given consideration to means of reducing the number and amount of minor under- and overpayments, the frequency of grant changes and the number of supplemental payments; and

WHEREAS it appears to this Board that more realistic planning by county workers with recipients of aid may be desirable to reduce the administrative effort now going into repeated month-by-month determinations of precise amounts of need and income as well as into the frequent minor corrections, either through grant adjustment or repayment, now required to be made; and

WHEREAS it is the desire of this Board that alternative methods be more fully explored by actual test in counties selected by the State Director: Therefore be it

RESOLVED, That the State Director be, and he is hereby empowered to select, with county concurrence, counties to use the following general rules instead of the current rules, relating to the process of determining the amount of income and need of applicants for or recipients of Old Age Security, Aid to Needy Blind, and Aid to Needy Children in family units:

- A. The county shall explore with the recipient the various amounts and kinds of need and income which he has or expects to have. The period over which these various individual amounts may be reasonably stable and predictable shall be determined and a money determination of each of them shall be made.
- B. The amounts of money for need and income thus fixed become the amounts of need and income to be considered in determining the amount of the grant for each appropriate month.

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- C. Where an amount of need or income has been determined by reasonable estimate, the amount so determined shall not be subject to adjustment or correction on an after-the-fact basis with respect to aid already paid except as follows:
1. When the predicted need or income factor changes substantially in a manner not anticipated

and

 - a. Such change is an increase in need or a decrease in income and is reported promptly;
 - or
 - b. Such change is a decrease in need or an increase in income and is not reported promptly.
 2. When the information on which the estimate was based was incorrect, or became incorrect, as the result of purposeful withholding or misrepresentation of fact by the recipient and the recipient has by this means obtained funds to which he was not entitled.
- D. When the circumstances change substantially from those predicted in the plan the county shall promptly make a new plan for the continuing grant, taking into consideration the changed circumstances; and be it further

RESOLVED, That counties operating under the foregoing rule shall implement said rule by a county plan of operation outlining the discretion to be exercised, such plan to be subject to the approval of the State Director; and be it further

RESOLVED, That appeals arising from this experimental project will be decided by the Board, pursuant to the above principles, on the basis of what the Board determines to be reasonable according to the merits of the case.

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Copy below is hereby certified to be a true and correct copy of regulations adopted, or amended, or an order of repeal by:

State Department of Social Welfare

(Agency)

Dated: March 29, 1956

By: *George J. Wyman*

Director

(Title)

FILED

In the Office of the Secretary of State
of the State of California

MAR 30 1956

At 3:05 o'clock p.m. CB

FRANK M. JORDAN, Secretary of State

By: *Frank M. Jordan*

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A-015.20 ANNUAL REINVESTIGATION REQUIREMENT

A-015.20

Whether or not certain aspects of the recipient's situation have been reinvestigated earlier, a reinvestigation of all circumstances of the recipient subject to change shall be made at least once annually. The due date shall be set according to any plan which provides for completion of such a reinvestigation not later than twelve months from completion of the initial investigation or the previous reinvestigation.

The county shall consider as the date of completion of the annual reinvestigation the date the county worker or the case supervisor or the county welfare director signed the reverse of the completed Affirmation of Eligibility, Form Ag 206.

These Regulations are designated to become effective MAY 1 1956

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CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
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(Pursuant to Government Code Section 11380.1)

B-234 DETERMINATION OF CONTINUING ELIGIBILITY
(Subsection D only)

B-234

D. Due Date of Annual Redetermination

The date for completion of redetermination of eligibility may be set according to any plan which guarantees such determination once annually. This date may be set on the basis of the beginning date of aid, the date of the last redetermination, or any other arbitrary date may be set provided such date does not establish the due date for the completion of the next redetermination beyond twelve months from the month in which aid began or from the month in which the last redetermination was completed.

It is customary to begin work on individual cases in advance of the particular month in which the determination is due to be completed. This may result in the redetermination for some cases being completed in advance of the anniversary month. If a redetermination is completed in advance of the anniversary month, an adjustment of the due date for the next redetermination is necessary so that not more than twelve months elapse between redeterminations.

Example: The worker is notified in April that the redetermination is due to be completed in July. Redetermination of eligibility is begun immediately and in May the redetermination is completed two months before the anniversary month. The due date for the next redetermination changes to not more than twelve months from the present redetermination, i.e., May.

A redetermination date once set may be changed provided the adjusted date results in the new due date being set not later than twelve months from the original investigation or last redetermination. When two or more persons in the family group are receiving aid, it may be desirable to make the redetermination for each such recipient at the same time. Under these circumstances the redetermination for each recipient living in the same household is made in the month in which the earliest redetermination falls due. The next redetermination for each would be due not later than twelve months from such redetermination. Similarly it may be of advantage to adjust the redetermination date for persons living in a particular vicinity so that redeterminations will fall due in the same month.

The date redetermination was completed is defined as the month in which the county worker and/or the case supervisor or county welfare director (dependent upon county discretion in determining when the redetermination is "completed") signed the reverse of the completed Form Bl 206.

These Regulations are designated to become effective MAY 1 '56

CONTINUATION SHEET
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B-615 SPECIAL NEED FOR MEDICAL CARE, AND ONLY
(Subsection J only)

B-615

J. Eyeglasses

If eyeglasses are prescribed by a physician or practitioner, the actual cost thereof represents a special need within the following maximum allowances:

Bifocal (or cataract) lenses and frame -- \$27.50
Single vision lenses and frame -- \$17.50
Refraction -- \$15

If a recipient already possesses adequate frames, a special allowance shall be made for lenses only. The maximum allowance for lenses is:

Bifocal (or cataract) lenses -- \$10 each
Single vision lenses -- \$5 each

If tinted lenses are recommended by the physician or practitioner, the additional cost not to exceed \$2 for each lens represents special need. If a prism is recommended, an additional cost not to exceed \$2 for each lens represents special need.

A special need allowance shall be made for only one pair of glasses, e.g., if reading glasses are recommended, an additional allowance cannot be made for glasses for distance vision, or for sun glasses.

The above maximum allowances do not cover state and city sales tax or carrying charges, if any. These costs, if incurred, shall be added to the above maxima.

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These Regulations are designated to become effective MAY 1 '56

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C-262 DEFINITION OF REGULAR SCHOOL ATTENDANCE

C-262

Regular school attendance is defined as:

1. Attendance in a public or private grade school, high school, trade school, or college.
2. Participation in home instruction under the public school system if the child is unable to attend school.
3. Attendance in a continuation school for a minimum of 15 hours per week.

Temporary absence from school does not affect eligibility. Temporary absence is defined as absence for reasons customarily accepted under the compulsory attendance laws, or occasioned by religious holidays, regular vacation period, ill health of the child, family crisis, temporary work permits, or suspension of not over two weeks.

If application is made or restoration is requested during the vacation period for a child 16 to 18 years of age and he does not enroll in school at the beginning of the new school year, eligibility ceases at the end of the month in which the new school year begins unless the child is determined to be disabled or employed and contributing to the family.

If a child 16 to 18 years of age terminates regular attendance prior to the close of the school year, eligibility for that child ceases effective the last day of the month in which termination of regular attendance occurs unless he is determined to be disabled or employed and contributing to the family.

(W&IC 1500, 1560)

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These Regulations are designated to become effective MAY 1 '56

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F-220 DESTRUCTION OF COUNTY FISCAL RECORDS

F-220

Forms and records required by SDSW for fiscal review and field audit purposes need be kept a limited time only. The retention periods are as follows:

A. DAILY TIME REPORTS

Daily time reports, Form DFA 42, shall be retained for one full month following the month covered by the time record. (See Sec. F-820) Special daily time reports, Form DFA 42a, (used in weighted persons count study) shall be retained until notification is received from SDSW that such records may be destroyed.

B. MONTHLY TIME REPORTS

Monthly time reports, Form DFA 43, shall be retained until notification is received from SDSW that such records may be destroyed.

C. RECORDS AND CONTROLS IN SUPPORT OF AID CLAIMS,
BATCH VOUCHER DOCUMENTS

Reports of Repayment, Form ABC 808, or its equivalent (See Sec. F-710-G) and extra copies of authorization documents for individual cases supporting the reconciliation of aid authorizations to claims, shall be retained until notification is received from SDSW that such records may be destroyed. (See Sec. F-240)

D. GOVERNMENTAL PARTICIPATION CONTROLS

Control records maintained by the county in accordance with Sec. F-250 shall be retained until notification is received from SDSW that such records may be destroyed.

Upon completion of state and federal audits, the county will be notified in writing by SDSW that Special Daily Time Reports, Form DFA 42a, as well as records listed under B, C and D above, may be destroyed.

(W&IC 116)

DO NOT WRITE IN THIS SPACE

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F-360 PAYMENTS IN ANC MISMANAGEMENT CASES
(Subsection B, 2 only)

F-360

2. Financial Record of Payments in Kind

The county welfare department shall maintain a centrally filed financial record for each mismanagement case for which there are payments in kind. (See Suggested Form E.) This record shall show:

- a. The date on which payment under mismanagement determination becomes effective and when terminated,
- b. The amount of the monthly authorization,
- c. The portion thereof to be paid by warrant to the payee,
- d. The amount available monthly for encumbrance by vendor orders for payments in kind,
- e. The date, number, and amount of each vendor order issued and the type of goods or services specified therein,
- f. The date, auditor's warrant number, and amount of payments made on claims rendered by vendors to whom orders have been issued. If the vendor is the county commissary, an auditor's journal voucher or other document according to practice in the county is to be entered in lieu of warrant number, and
- g. A running balance of accumulated amounts unencumbered. (See Sec. F-730, H, 2)

Whatever procedure is usually followed in the county in payment of bills may be followed in payment of vendor claims. However, the system should provide for flow of current information to the welfare department in order that prompt postings may be made to the financial record.

These Regulations are designated to become effective MAY 1 '56

CONTINUATION SHEET
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800-30 NARRATIVE REPORTS
CWS

800-30

Each county having a CWS contract shall send a quarterly narrative report to the SDSW by the tenth day of the month following the last calendar month of the quarter (e.g. by April 10 for Jan - Mar quarter). These reports should cover significant developments in the community with reference to child welfare. Their purpose is:

1. To give a comprehensive picture of local conditions affecting children;
2. To accumulate facts regarding child welfare which may indicate trends or clarify issues;
3. To provide a basis for discussion of present needs and status of the county child welfare program and plans for future action;
4. To evaluate child welfare services rendered by the county.

The narrative should be viewed as a general guide to the development of child welfare program in the county. The nature of the report depends, in part, on the specific functions of the child welfare program as set forth in the agreement. Not all services need be included in every report. At all times, flexibility in reporting is desired. The county welfare director may discuss with the SDSW field staff the nature and details of the narrative report for a particular area.

(W&IC 115, 116)

DO NOT WRITE IN THIS SPACE

MAY 1 '56

These Regulations are designated to become effective

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

Regulations	INSTITUTIONAL STATUS	A-141.40
A-141	ELIGIBILITY IN A PUBLIC INSTITUTION	A-141
A-141.10	DEFINITIONS	A-141.10

A public institution is a facility which affords shelter or care, or in which treatment is given for any physical or mental illness, and which is managed in whole or in part by a public instrumentality or is maintained from public funds.

A public medical institution is a) any county, city or district hospital, or unit thereof, which is licensed under H&SC 212 by the California Department of Public Health; or b) a medical unit of the Veteran's Home of California.

A patient is one who is receiving planned, continuing medical treatment, including physician services and nursing care, directed toward improvement in health; or is receiving medical treatment for an illness for which medical measures are required though improvement in health or recovery cannot be expected.

A-141.20	ELIGIBILITY IN A PUBLIC MEDICAL INSTITUTION	A-141.20
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An otherwise eligible person (not excluded by W&IC 2160. h, i, j, or k) is eligible to receive aid while he is a patient in a public medical institution if he is not involuntarily detained by legal process other than a quarantine requirement. (See Sec. A-225, Vendor Payments to Public Medical Institutions and Sec. A-205.6, Special Need for Care in a Public Medical Institution.)

A-141.30	ELIGIBILITY IN OTHER PUBLIC INSTITUTIONS	A-141.30
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A patient or inmate of a public institution who qualifies under W&IC 2160.1 is eligible to receive his first payment while still an inmate if he has a bona fide plan to leave the institution upon receipt of the first payment. Continuing eligibility for such persons exists only if the recipient leaves the institution on or before the last day of the month for which the initial payment is made.

If such a person remains in a public institution after the last day of the month for which the one payment was made, he is ineligible through the month in which he leaves the institution.

A recipient who enters and remains in a public institution other than a public medical institution is ineligible for aid after the month in which he enters the institution.

A-141.40	EVIDENCE OF ELIGIBILITY IN A PUBLIC MEDICAL INSTITUTION	A-141.40
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A monthly certification by a responsible official of the public medical institution is required as evidence that the recipient was an eligible patient in a medical ward or unit of the institution. (See Sec. _____, Forms AB 236A and 236B) Immediate notification to the county welfare department is required if the patient dies or leaves the medical ward or unit.

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
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A-141.50	INSTITUTIONAL STATUS	Regulations
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A-141.50	EVIDENCE OF ELIGIBILITY IN OTHER PUBLIC INSTITUTIONS	A-141.50
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Evidence of a bona fide plan for leaving the public institution is required for a patient or inmate who qualifies under W&IC 2160.1. A certification that such a recipient left the institution on or before the last day of the month for which the initial payment was made is required as evidence of eligibility to continuing aid. (See Appendix Fiscal Manual Sections, Sec. F-520, Federal Participation in Aid Payments, Sec. _____, Form AB 231 and Sec. 014.20, Restoration Following Discontinuance Due to Confinement in a Public Institution.)

A-142	ELIGIBILITY IN A PRIVATE HOSPITAL	A-142
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An otherwise eligible person is eligible to receive aid while in a private hospital. (See Sec. A-205.4, Special Need for Private Hospital Care.)

A-143	ELIGIBILITY IN A PRIVATE INSTITUTION	A-143
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A-143.10	DEFINITIONS	A-143.10
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A private institution is a commercial, nonprofit, fraternal or benevolent facility managed and controlled by an individual, association or corporation for the purpose of giving shelter and care to groups of people, and which receives no support from public funds.

A life care contract is an agreement whereby, for a consideration, an organization or individual is obligated to give complete or partial support and care to a resident in a home or institution operated by the organization or individual for a period in excess of one month.

A-143.20	ELIGIBILITY REQUIREMENTS	A-143.20
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An otherwise eligible person is eligible to receive aid while in a private institution except where he is receiving, or has an enforceable contract with a solvent institution to receive, full support in accordance with the OAS Standard. (See Sec. A-135.10, Personal Property Items to be Included and A-138.31, Transfer in Return for Life Care.)

Eligibility for admission to a private institution does not render an applicant or recipient ineligible if he does not wish to live in the institution.

A-143.30	EVIDENCE OF ELIGIBILITY	A-143.30
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Evidence of the contractual obligation of the institution to the resident is required.

A written notification that a resolution was adopted by the governing body of a non-profit, fraternal or benevolent institution requesting payment is required as evidence that the resident must pay for the support and care furnished.

A written statement from a commercial institution requesting payment or giving the charges for support for the resident is required as evidence that he must pay for support furnished.

(See Sec. A-212.3, Evaluation of Income in Kind.)

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Regulations	DETERMINATION OF NEED	A-202
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A-201	DETERMINATION OF NEED - GENERAL	A-201
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The total need of an applicant or recipient is the money amount necessary to provide those items of support set forth in the subsequent sections of this chapter as basic needs and special needs.

The county is responsible for reviewing needs with the applicant or recipient and for identifying any special needs he may have. The applicant or recipient is responsible for reporting his needs and for informing the county promptly of changes.

If the applicant or recipient has income from any source, the money amount of his total need is computed by adding the cost (within the limitations specified in this chapter) of any special needs he may have to the allowance for basic needs. Exception: When a recipient is in a boarding home, nursing home or public medical institution. (See Secs. A-204.11, A-205.3 and A-205.6.)

A-202	BASIC NEEDS COMMON TO ALL RECIPIENTS	A-202
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The following basic items of need are considered to be common to all recipients and to be provided by the maximum OAS grant in the amounts and to the extent specified:

Food	\$28.50 - For food in the normal amount and of a kind necessary to maintain health and vigor.
Housing	15.00 - For adequate, suitable, sanitary housing in a locality chosen by the recipient.
Utilities	6.30 - For light, water, garbage disposal, refrigeration, and heat needed to maintain health and comfort.
Household Maintenance	4.50 - For ordinary upkeep and occasional replacement of small items of household equipment and supplies.
Clothing	7.70 - For adequate, healthful clothing.
Transportation	6.00 - For transportation for social and ordinary shopping purposes.
Incidentals	13.50 - For hair care, personal toilet articles, dry cleaning, home medicine chest, tobacco, etc.
Education and Recreation	3.50 - For participation in community activities, adult education courses, hobbies, crafts, reading materials, movies, stationery, postage, etc.
TOTAL	<u>\$85.00</u>

CONTINUATION SHEET
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A-203 DETERMINATION OF NEED Regulations

A-203 SPECIAL NEEDS NOT COMMON TO ALL RECIPIENTS A-203

Special needs are those which are not common to all recipients and which arise out of physical infirmities or other conditions peculiar to the individual's circumstances. These may be for items or services not provided as basic needs or for greater amounts to meet the cost of basic items.

A-204 NON-MEDICAL SPECIAL NEEDS A-204

The items and services which are allowed as non-medical special needs under the conditions specified are listed in Secs. A-204.03 thru A-204.27.

A-204.03 SPECIAL NEED FOR FOOD A-204.03

When a doctor or practitioner recommends a special diet the amount shown on the current SCS Therapeutic Diet Schedule, is allowed.

When circumstances require that the recipient eat all of his meals in restaurants, an additional \$21.40 monthly is allowed. When he eats some but not all of his meals in restaurants, a lesser amount is allowed depending on the individual circumstances.

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CONTINUATION SHEET
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(Pursuant to Government Code Section 11380.1)

Regulations DETERMINATION OF NEED A-204.05

A-204.05 SPECIAL NEED FOR HOUSING A-204.05

When adequate rental housing within the \$15 basic allowance (\$21.30 when rent includes all utilities) is not available in the community, or where the recipient or spouse must live because of a health condition or need to be near a place of employment, an additional amount is allowed.

- 1. For a recipient living alone or with someone other than a spouse, the additional amount, not to exceed \$25 monthly, which the recipient needs to pay his share of the rent is allowed.
- 2. For a recipient living with a spouse (whether or not the spouse is a recipient of aid), the additional amount, not to exceed \$17.50 monthly, (\$14.35 if rent includes all utilities), which the recipient needs to pay his share of the total rental is allowed.

When the recipient lives in his own home and the monthly cost of prorated taxes, insurance, required encumbrance payment (principal and interest), a \$2 monthly allowance for minor repairs and upkeep, and net occupancy value, exceeds the \$15 standard allowance, an additional amount is allowed if other housing is not available in the community or where the recipient or spouse must live because of a health condition or need to be near place of employment.

- 1. For a recipient living alone or with someone other than a spouse, the additional amount, not to exceed \$25 monthly needed to pay his share of the total ownership cost, is allowed.
- 2. For a recipient living with a spouse (whether or not the spouse is a recipient of aid), the additional amount, not to exceed \$17.50 monthly needed to pay his share of the total ownership cost is allowed.

When the housing cost exceeds the \$15 basic allowance plus the special need allowances specified above, the actual amount paid is allowed for a 3-month period to enable the recipient to move to other rental housing, to refinance his home property, or to make such other adjustments as may be possible to bring the cost within the maximum allowable amount. Thereafter, if no adjustment has been made, only the maximum is allowed.

When repairs are necessary in order to provide safe and healthful housing or to minimize deterioration and the recipient's share of the total cost is over \$10, the cost, not to exceed the minimum amount for which reasonably adequate repairs can be made, is allowed.

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CONTINUATION SHEET
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A-204.07	DETERMINATION OF NEED	Regulations
A-204.07	SPECIAL NEED FOR UTILITIES	A-204.07
When the cost of utilities to provide light, water, garbage disposal, refrigeration, heat and sewers (if paid as a utility charge) in the amount and of a type necessary to maintain health and comfort exceeds the basic amount of \$6.30, the additional amount, not to exceed \$11.50 monthly, is allowed.		
A-204.09	SPECIAL NEED FOR BOARD AND ROOM	A-204.09
When the recipient is paying for board and room and the charge is over \$55, an additional amount, not to exceed the usual community rate, is allowed. Board and room is considered to include housing, food, utilities and household maintenance but no personal care or supervision.		
A-204.11	SPECIAL NEED FOR BOARD AND PERSONAL CARE	A-204.11
When a recipient is in an aged boarding home and receives some personal care (but not nursing care), the amount charged for support and care, not to exceed \$125 monthly, is allowed in lieu of any basic allowances for food, housing, utilities and household maintenance, and to cover the cost of personal care. In addition, \$25 is allowed in lieu of the basic allowances for clothing, incidentals, transportation, education and recreation and also special needs for medical care and transportation are allowed under the conditions and within the maxima specified.		
A-204.13	SPECIAL NEED FOR CLOTHING	A-204.13
The cost of replacement of necessary clothing lost or destroyed in a catastrophe, such as a fire, flood, etc., is allowed.		
A-204.15	SPECIAL NEED FOR REPLACEMENT OR REPAIR OF HOUSEHOLD EQUIPMENT	A-204.15
When replacement or repair of essential household furniture or equipment is necessary, the cost, not to exceed the minimum amount for which the item or service of a type which will meet the recipient's need can be obtained, is allowed. Prior county concurrence on the plan for purchase or repair is to be encouraged but is not required as a condition for making the allowance.		
A-204.17	SPECIAL NEED FOR TRANSPORTATION	A-204.17
When the cost of essential transportation exceeds the \$6 basic allowance, an additional amount, not to exceed \$10.50 monthly, is allowed. When there is no public transportation available and ownership of an automobile is a necessity because of distance from shopping and medical facilities, the total transportation allowance (\$6.00 basic plus \$10.50 special) is applicable to payments and upkeep on an automobile.		

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Regulations	DETERMINATION OF NEED	A-205
A-204.19	SPECIAL NEED FOR MOVING	A-204.19
The cost of moving expense, not to exceed the usual community rate for such service, is allowed if no other provisions for moving costs can be made and a move is necessary because of eviction, to obtain lower cost housing, or to obtain housing which better meets the needs of the recipient.		
A-204.21	SPECIAL NEED FOR STORAGE OF HOUSEHOLD AND PERSONAL GOODS	A-204.21
The cost of storage of household and personal goods, not to exceed the usual community rate for such services, is allowed when no other plan can be made and storage is temporarily necessary.		
A-204.23	SPECIAL NEED FOR HOUSEKEEPING SERVICE	A-204.23
The cost of housekeeping service, not to exceed the usual community rate for such service is allowed when the physical condition of the recipient requires such service.		
A-204.25	SPECIAL NEED FOR LAUNDRY SERVICE	A-204.25
The cost of laundry service, not to exceed \$5 monthly, is allowed when the recipient does not have facilities for doing laundry himself or when his health or handicap prevents such activity.		
A-204.27	SPECIAL NEED FOR TELEPHONE	A-204.27
The cost of a telephone, not to exceed \$4 monthly, is allowed when a telephone is necessary because of ill health or isolation.		
A-205	SPECIAL NEED FOR MEDICAL CARE	A-205
Medical care includes the services of doctors, dentists, nurses, and practitioners of any of the healing arts, including therapy by prayer or other spiritual means; clinic, convalescent and hospital care; drugs and medical supplies; surgical and prosthetic appliances and X-ray and laboratory services, as required for diagnosis, care and treatment.		
The recipient is a free agent in his choice and purchase of medical care. After he goes for treatment, what he needs and how much is determined by the doctor or practitioner, but he chooses what he will have of what he needs.		
The items and services which are allowed as special medical needs under the conditions specified are listed in the following sections, A-205.1 through A-205.11.		

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A-205.1	DETERMINATION OF NEED	Regulations
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A-205.1	SPECIAL NEED FOR DOCTOR'S AND PRACTITIONER'S SERVICES	A-205.1
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When a recipient as a private patient receives diagnosis or treatment from a physician, surgeon or practitioner, the amount required to purchase such service is allowed.

A-205.2	SPECIAL NEED FOR MEDICATION	A-205.2
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When prescription and proprietary drugs, or other medication, are prescribed by a doctor or practitioner and the cost is not included in his charge for service, the cost is allowed.

A-205.3	SPECIAL NEED FOR NURSING CARE	A-205.3
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When a recipient is in an aged boarding home or a nursing home and receives nursing care recommended by a doctor or practitioner, the amount charged for support and care, not to exceed the maximum specified below for the type of care required, is allowed in lieu of any basic allowances for food, housing, utilities, household maintenance, and to cover the cost of nursing care and supervision.

- A. For those recipients who require some, but not extensive, nursing care (rendered by a registered or practical nurse), the maximum allowance is \$165.
- B. For those recipients who require extensive nursing care and supervision, the maximum allowance is \$210.

In addition, \$25 monthly is allowed in lieu of the basic allowances for clothing, incidentals, transportation, education and recreation. Also, special needs for medical care and transportation are allowed under the conditions and within the maxima specified.

If a private room is recommended, the cost, not to exceed \$50 monthly, is added to the maxima specified in A and B above.)

When the cost exceeds the maximum specified, the actual cost is allowed for a 3-month period to enable the recipient to secure care within the maximum. Thereafter, if the recipient remains under care at a rate exceeding the maximum, only the maximum is allowed. Exception: When there are no available facilities in the community within the maximum, or the doctor or practitioner recommends against moving the recipient, an amount above the maximum, but not to exceed the minimum amount for which adequate care for the individual can be secured, is allowed.

CALIFORNIA-SDSW-MANUAL-OAS

Issue No. 20-10

Effective May 1, 1956

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WITH THE SECRETARY OF STATE**
(Pursuant to Government Code Section 11380.1)

Regulations

DETERMINATION OF NEED

A-205.7

A-205.4 SPECIAL NEED FOR HOME NURSING CARE

A-205.4

When the recipient receives services of a registered or a practical nurse in his own home, an amount, not to exceed \$165 monthly, is allowed as a special need. An additional amount, not to exceed \$30 monthly, is allowed if needed to cover cost of food for the nurse.

When nursing service is provided through a visiting nurse association or similar organization (excluding public health nursing service of public health departments), the usual charge per visit is allowed.

A-205.5 SPECIAL NEED FOR PRIVATE HOSPITAL CARE

A-205.5

When private hospital care is recommended by a doctor or practitioner and the type of care required is not available for less in the community, the cost is allowed as a special need. Private hospital care also includes care rendered in a public hospital if recipient pays for care at private care rate and is attended by his own physician.

A-205.6 SPECIAL NEED FOR PREPAID MEDICAL OR HOSPITAL CARE

A-205.6

When the recipient is enrolled in a prepaid medical or hospital care plan or carries disability insurance which includes coverage for hospitalization and/or medical care, the cost, not to exceed \$6 monthly, is allowed as a special need.

Exception: The cost of insurance in which a disability clause is incidental or which has limited coverage insuring only against specified illnesses (e.g., polio, rabies, etc.) is not allowed as a special need.

A-205.7 SPECIAL NEED FOR CARE IN A PUBLIC MEDICAL INSTITUTION

A-205.7

When part or all of the grant is being paid to a public medical institution on behalf of an eligible patient (see Sec. A-141.20 Eligibility in a Public Medical Institution, and Sec. A-225 Vendor Payments to Public Medical Institutions), the amount certified by the hospital to be the cost of care is allowed in lieu of all basic allowances except incidentals and to cover the cost of special medical needs provided by the institution. The cost of care is computed by the method which the county ordinarily uses in determining cost for other purposes, e.g., unit cost of services rendered, cost per diem, etc.

In addition, \$13.50 monthly is allowed for personal and incidental expenses. Also special medical needs not provided by the medical institution are allowed under the conditions and within the maxima specified.

CALIFORNIA-SDSW-MANUAL-OAS

Issue No. 20-11

Effective May 1, 1956

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(Pursuant to Government Code Section 11380.1)

A-205.8	DETERMINATION OF NEED	Regulations
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A-205.8	SPECIAL NEED FOR SUPPLEMENTARY MEDICAL SERVICES AND EQUIPMENT	A-205.8
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When a doctor or practitioner recommends the use of laboratory service, X-rays, appliances, sick room equipment, etc., the cost is allowed as a special need.

A-205.9	SPECIAL NEED FOR DENTAL CARE	A-205.9
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When a recipient receives dental care, the cost, not to exceed the minimum charges generally acceptable by dentists in the community, is allowed as a special need.

A-205.10	SPECIAL NEED FOR EYEGLASSES	A-205.10
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The cost of refractions and of eyeglasses recommended as a result thereof, not to exceed the following maxima, are allowed as special needs.

Refraction	\$15.00
Bifocal (or cataract) lenses - each lens	10.00
Single vision lenses - each lens	5.00
Tinted lenses - additional for each lens	2.00
Prism - additional for each lens	2.00
Frames	7.50

(Sales tax and carrying charges, if any, are added to the above maxima.)

Only one type of glasses is allowable as a special need, e.g., if reading glasses are recommended, additional allowance is not made for glasses for distance vision or sunglasses.

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CONTINUATION SHEET
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Regulations	DETERMINATION OF NEED	A-206.3
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A-205.11	SPECIAL NEED FOR HEARING AIDS	A-205.11
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When an otologist states that the recipient will benefit from use of a hearing aid, the cost, not to exceed the following maxima, is allowed as a special need:

Examination by otologist	-	\$ 10.00
Hearing Aid	-	175.00
Monthly upkeep on hearing aid	-	5.00

(Sales tax and carrying charges, if any, are added to the above maxima.)

If the otologist makes a specific recommendation that a recipient can benefit only from a type of hearing aid costing more than the maximum, the actual cost of the type of hearing aid needed is allowed.

A-206	SPECIAL NEED TO MEET PAYMENTS ON DEBTS	A-206
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A-206.1	DEBTS INCURRED BEFORE DATE OF APPLICATION	A-206.1
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Allowance is made for payments on debts secured by a current necessity before the date of application; e.g., the home, essentials such as household equipment, automobiles, hearing aids, prosthetic appliances, etc., irrespective of the purpose for which the debt was incurred. (See Secs. A-204.05 and A-204.17)

A-206.2	DEBTS INCURRED WHILE APPLICANT OR RECIPIENT	A-206.2
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Allowance is made for payments on debts incurred or increased after application for aid or while receiving aid if the debt was incurred or increased to pay for an item allowable as a special need. Exception: When a recipient's grant has included a special need allowance for the item and the grant plus income has met total need, such amounts are not allowed for payment on a debt for the same item.

A-206.3	MAXIMUM ALLOWANCES FOR PAYMENTS ON DEBTS	A-206.3
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The total allowance for payments on any debt incurred or increased after application to pay for an item for which a maximum special need allowance is specified is not to exceed that maximum. For types of medical care for which no maximum is specified the total allowance on debt contracted to pay for any one illness occurring in a single year is not to exceed \$300.

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A-206.4 DETERMINATION OF NEED Regulations

A-206.4 TIME LIMIT FOR PAYMENTS ON DEBTS A-206.4

Allowance for payments on all unsecured debts is limited to a period of 14 months following the month in which the need occurred whether or not full allowance for payment of the debt can be made in this time limit. If a recipient converts such a debt to one secured by his home or some other current necessity, the same time limit applies.

Special need allowances for payments on all debts (secured or unsecured) begin with the month in which the debt is reported. Exception: When the report is made as soon as could reasonably be expected under the circumstances stated in Sec. A-221, allowance for payment on such debts is made beginning with the month following the occurrence which gave rise to the debt.

A-207 EVIDENCE OF SPECIAL NEED A-207

Before a payment which includes a special need allowance is made, evidence is required to establish:

- 1. That the conditions under which the need may be allowed are met;
- 2. The monthly cost and/or the total cost of the need;
- 3. The proportion of the cost which should be borne by the recipient if the need is shared by others in the household;
- 4. The period, if predictable, over which the need will continue.

The cost of medical needs which are fluctuating and/or unpredictable in their occurrence and amount, i.e., services of a doctor or practitioner, most medications, hospital care, home nursing service, dental care, etc., will be redetermined monthly. The cost of other special needs will be redetermined as often as necessary, considering the type of need and the potential for change.

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Regulations	DETERMINATION OF INCOME	A-211
A-211	INCOME - DEFINITIONS	A-211

Income is any benefit in cash or in kind received as a result of current or past labor or services, business activities, interests in real or personal property, or as a contribution from persons, organizations or assistance agencies. Exception: Certain benefits received as non-recurring lump sum payments and proceeds received from sale of property (excluding proceeds from sale of less than an entire holding of livestock, poultry, timber, etc.) are considered personal property rather than income. (See Secs. A-136, Differentiation of Personal Property and Income, and A-137, Acquisition and Conversion of Real or Personal Property.)

Separate income is a) income derived as a result of an interest in separate property, or, b) income resulting from employment or military service rendered prior to the present marriage.

Community income is

- a. Income derived as a result of an interest in community property, or,
- b. Income resulting from employment or military service performed during the present marriage or being performed at the time of the present marriage. Exception: If the applicant or recipient has relinquished his community interest in his spouse's earnings by oral or written agreement, such income is separate income of the spouse. If it is determined that the agreement was made for the purpose of qualifying for aid or for a greater amount of aid, such income is considered community income.
- c. Income from the earnings of a minor child, unless the child has been emancipated. (See Sec. A-152, Responsibility of Adult Child.)

Current income is that which is received in the current month regardless of the period over which it accrued. Exception: Interest payments in decreasing amounts may be averaged. Any unexpended portion of current income becomes personal property on the first of the month following receipt of the income. Exception: See Sec. A-212.7, Recurring Lump Sum Income.

Casual income is income which is 1) unpredictable as to amount and time of receipt; 2) of short duration; and 3) of negligible importance in meeting continuing needs under the OAS standard. Such income is not considered in determining the amount of the aid payment.

Income from an inconsequential resource is the net return from an interest in real or personal property which makes no appreciable contribution to the continuing needs of a recipient under the OAS standard. Such income is not considered in determining the amount of the aid payment.

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A-212

DETERMINATION OF INCOME

Regulations

A-212

DETERMINATION OF AMOUNT OF INCOME

A-212

The county is responsible for 1) reviewing with the applicant or recipient all his resources in light of their income producing potentials; 2) encouraging the production of income within the applicant or recipient's capabilities; 3) determining whether income is actually received and, if so, the regularity of receipt, the net amount, the applicant or recipient's share, and whether it is casual or from an inconsequential resource.

Resources which are to be evaluated as income producing potentials include:

1. Social insurance i.e., OASI, Railroad Retirement, Unemployment Insurance, Disability Insurance, etc.
2. Benefits available to veterans, servicemen and their dependents.
3. Rights and interests in real and personal property. (See Sec. A-133)
4. Responsible relatives and other persons who may be contributing. (See Chap. A-15)
5. Recipient's own capacity for self help and employment
6. Private pension plans, union welfare funds, life insurance disability benefits, other forms of assistance, etc.

The applicant or recipient is responsible for giving information necessary to such determinations and for taking all actions necessary to receive unconditionally available income. Income is to be considered unconditionally available if the applicant or recipient has only to claim or accept the income, e.g., relative's offer of a contribution, OASI or Disability Insurance. Ineligibility results if an applicant or recipient refuses to accept such income. (See Sec. A-133.53, When Utilization is Feasible.)

A-212.30 NET INCOME

A-212.30

Net income from property (including that from property in which a life estate is held), produce or business enterprises is determined by deducting from gross income all normal items of expense incident to its receipt. Principal payments on encumbrances are not considered a necessary item of expense except when determining net occupancy value of a home. (See Sec. A-212.9)

Net income from wages, salaries or commissions is the amount remaining after subtracting all required deductions and expenses incurred in the securing and retention of employment. Exception: See Sec. A-212.51 for expenses included in determining need of an employed ineligible spouse.

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Regulations

DETERMINATION OF INCOME

A-212.40

A-212.40 EVALUATION OF INCOME IN KIND

A-212.40

Income in kind is any benefit received other than in cash.

When a need is being contributed to an applicant or recipient, either directly or by payment to the vendor, the value placed upon such income is to be the amount specified for the item in the OAS standard of assistance. (See Chapter 20)
Exception: When there is a contribution of free rent, the value to be placed on such income is not to exceed the rental charge for comparable shelter in the community and is to be \$15, \$10 or \$5, dependent on the adequacy of the housing. (For free rent given by responsible relative see Sec. A-153.4, Evaluation of Free Rent)

1. Standard housing is a dwelling or a room which meets standards of health, safety and decency, and provides privacy, sanitary facilities and comfort.
2. Intermediate housing is a dwelling or a room which does not have adequate provision for privacy and comfort but which provides minimum sanitary facilities and safety.
3. Substandard housing is a dwelling or a room which does not have adequate sanitary facilities, nor provide for privacy, comfort and safety.

No more than \$3 is to be considered the value of a makeshift shelter, such as a dugout, cave or tent.

When a contribution is received in the form of payments on an encumbrance on the recipient's property, the amount of the payment is income.

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An additional amount is allowed to meet the needs of minor children. Any balance up to one-half of the income is to be allocated to the recipient.

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Regulations	DETERMINATION OF INCOME	A-212.54
A-212.52	SEPARATE INCOME	A-212.52
<u>Separate income of the recipient from any source is not to be allocated to the spouse. Exception: See Sec. A-212.53.</u> <u>Separate income of the ineligible spouse is not to be arbitrarily allocated to the recipient. Only the amount actually contributed in cash or in kind to the recipient is his income. (Liability of the ineligible spouse is determined in accord with the Responsible Relative Scale; see Chapter A-15.)</u>		
A-212.53	OASI AND RAILROAD RETIREMENT INCOME	A-212.53
<u>When both of a couple are receiving benefits, the benefit of each is to be considered the separate income of each. Regulations above on allocation of separate income then govern.</u> <u>When the recipient is receiving a benefit and the spouse is ineligible for a benefit, up to one-half of such income may be allocated to the spouse if his needs are not otherwise met. If the spouse becomes eligible for a benefit and files his claim promptly, the allocation may continue until he receives his award. If the spouse refuses to file a claim, the allocation may not continue after the month in which the 65th birthday is reached.</u> <u>When the ineligible spouse is receiving a benefit and the recipient is ineligible to a benefit, a determination is to be made as to whether the benefit is separate or community income. Regulations above on allocation of separate and community income then govern.</u>		
A-212.54	INCOME RECEIVED AS A DEPENDENT OF A SERVICEMAN	A-212.54
Such income received by either of a couple is to be allocated to the ineligible spouse and his minor children in the amount needed for their support, unless the serviceman has otherwise stipulated.		
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A-212.7

DETERMINATION OF INCOME

Regulations

A-212.7

RECURRING LUMP SUM INCOME

A-212.7

Recurring lump sum income is income which has accrued over two or more months and which can be expected to be received at intervals in the future. The recipient's share of such income is to be applied to meet his needs as follows:

1. When such income is received as a contribution to cover a periodically recurring need such as taxes on the home, both the need and the income are prorated on a monthly basis.
2. When such income (other than Item 1, above) is received at regular intervals less frequent than monthly in a fixed amount, it is apportioned in equal amounts to a number of future months equivalent to the period over which it accrued.
3. When such income (other than Item 1, above) is received at regular intervals less frequent than monthly or at irregular intervals and/or in variable amounts, it is applied toward the recipient's needs as follows:
 - a. If such income together with the recipient's other income is less than his total need in the month received, it is to be considered income in the month received.
 - b. If such income together with the recipient's other income is equal to or more than his need in the month received, aid is to be discontinued.

At the time of discontinuance the recipient is to be advised of the approximate period over which the income is expected to support him and of his responsibility to request restoration when he is again in need. The recipient is expected to support himself from such income for a period of months equal to that obtained by dividing the lump sum income by the difference between his total need and his continuing income at the time the lump sum was received. If additional lump sum income is received during the period of discontinuance, the period is extended.

If restoration is requested effective with the expiration of the period during which the lump sum was expected to support the former recipient, aid is restored if he is otherwise eligible. Any portion of the lump sum income applicable to a fractional month is income for the month in which aid is restored.

If restoration is requested by an otherwise eligible former recipient before the expiration of the period during which the lump sum income was expected to support him, aid is restored, if a) it is determined that the lump sum income has in fact been expended, and b) it is established that it was expended for items which are recognizable as special needs, for emergency expenditures beyond the recipient's control, or for other necessary items reasonably consistent with the OAS standard.

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Regulations DETERMINATION OF INCOME A-212.9

A-212.9 INCOME VALUE OF HOMES OWNED AND OCCUPIED A-212.9

The income value resulting from occupancy of a home which the recipient owns or in which he holds life estate is determined in accordance with the assessed value of the property. The occupancy value to the recipient is based on the full assessed value whether or not he shares occupancy and ownership with others. (See Sec. A-212.40 for evaluation of free rent when a recipient is living in a home which is the separate property of a spouse who is bearing the cost of upkeep, taxes, etc.)

Unencumbered homes having a county assessed value of \$500 or less are considered to have an occupancy value of \$3 per month. The value of occupancy is considered to increase at the rate of \$1 per month for each additional \$500 assessed valuation or fraction thereof up to a maximum of \$9 per month.

Encumbered homes are considered to have a net occupancy value determined by subtracting from the gross value of occupancy (as determined above) the required payments, including principal and interest, or the recipient's share of these expenses if the home is community property. Exception: Encumbrance payments for which allowance has already been made as provided in Sec. A-206.2 are not deducted in determining net occupancy value.

When the property owned and occupied by the recipient contains more than one dwelling unit, the value of occupancy is based on the proportion of the assessed value which the unit the recipient occupies bears to the total dwelling space.

The value of occupancy of farm or ranch homes is based on the assessed value of the dwelling and one acre of land.

If the home is not assessed, the value of occupancy is based on the appraised value in accord with the following table:

APPRAISED VALUE	VALUE OF OCCUPANCY
\$ 500 or less	\$ 3.00
501 to 799	4.00
800 to 999	5.00
1,000 or over	6.00

If rent is paid for the land on which the dwelling rests, net occupancy value is determined by subtracting the monthly land rental from the appropriate figure in the table.

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A-213	DETERMINATION OF INCOME	Regulations
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A-213	VERIFICATION OF INCOME	A-213
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Evidence is required which establishes the gross and net amount of income received, the time of receipt, and whether it is separate or community income. Documents and records in the recipient's possession constitute adequate sources of evidence in the absence of conflicts.

When the recipient appears eligible to retirement or disability benefits of any kind, evidence is required that he has taken all necessary action to claim benefits. Where verification through OASI Bureau or the Railroad Retirement Board is necessary, the procedure is to be that agreed upon with the agency. (See Sec. _____, Form DPA 1)

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Regulations

AID PAYMENTS

A-222

A-221

AMOUNT OF AID PAYMENT

A-221

Aid is to be paid monthly, subject to the limitations of W&IC 2020, in the amount determined by subtracting the recipient's current net income received in the month (as determined in accord with Chapter A-21) from his total needs for the month (as specified in Chapter A-20.)

Payment is to be authorized, changed, suspended, denied or discontinued by use of Form Ag 278 or an approved substitute. (See Sec. _____, Form Ag 278)

In determining the amount of the aid payment for a particular month, all income and those special needs which existed and were reported before the end of that month are considered. Exceptions: 1) When the change could not have been known or reported before the end of the month because it occurred too late to give the recipient reasonable time to report within the month or the report was not received due to communication difficulties, etc., such change is to be reflected in the aid payment if reported by the end of the following month. 2) When special circumstances, such as the recipient's physical or mental incapacity, make it unreasonable to expect that he could have reported promptly, such change is reflected in the aid payment for the months in which it existed, if reported as soon as could reasonably be expected.

Any deficiency in a previous month between total need and the sum of the grant and the income is not to be carried forward and allowed as need in a subsequent month.

A-222

MONEY PAYMENT PRINCIPLE

A-222

Aid is to be paid by warrant immediately redeemable at par. Warrants are to be made payable to the recipient or his legal guardian with no restriction or control expressed or implied on expenditure of the money. No payments are to be made to a guardian who is accountable to the assistance agency or to a public institution responsible for providing care for the recipient.

A restricted payment is one in which an express or implied requirement is made of the recipient that delivery of the aid warrant is contingent upon making certain or specified payments from the aid granted. A restricted payment is not subject to federal and state participation.

The warrant is to be delivered to the recipient through the United States Mail to the address at which he customarily receives mail, or otherwise delivered to him according to his instructions. Delivery is to be made only to the recipient unless delivery to another person is expressly requested by the recipient. No requirement may be imposed which necessitates the warrant being delivered to, or cashed by, or cashed in the presence of a specified person other than the recipient or his guardian. (See Appendix Fiscal Manual Sections, Sec. F-310, Rules Governing Aid Payments.)

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Issue No. 22-16

Effective May 1, 1956

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A-223

AID PAYMENTS

Regulations

A-223

BEGINNING DATE OF AID

A-223

Subject to the provisions of W&IC 104.1, 2180.1, 2180.5, 2180.6 and 2183.9, the beginning date of aid is determined as follows:

1. When aid is authorized in the same month in which the application is signed or restoration requested, aid is paid from the date of signing of the application or requesting restoration.
2. When aid is authorized in a month subsequent to that in which the application is signed or restoration requested, aid is paid from the first day of the month in which authorization action is taken.
Exception: When authorization action is taken more than 60 days after the date of application or request for restoration, aid is paid from the first of the month in which authorizing action is taken, or from the first of the month following the expiration of the 60-day period, whichever is earlier. However, if eligibility is not established until a date subsequent to the date aid would begin under this exception, aid is to begin on the date the applicant became eligible. (See Sec. A-227.60, Action on Underpayments.)

The 60-day period referred to in W&IC 2180.5 begins on the day following that on which an application is signed or restoration is requested. When the 60th calendar day falls on a Sunday or legal holiday, the following day is considered the last day of the 60-day period.

3. If an application was improperly denied and such erroneous action is being corrected, aid is paid from the date it would have been paid had there been no denial action.

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Regulations	AID PAYMENTS	A-224
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A-224	INITIAL PAYMENTS	A-224
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An initial payment is the first payment made on new applications and restorations. (See Secs. A-014.10 and A-014.30) An initial payment may be withheld (see Sec. A-226.10) but is to be cancelled or delivered before the end of the month for which it was authorized. An initial payment is not to be suspended. (See Sec. A-226.12, Suspension of Aid.)

An initial payment is to be made within the month for which aid is granted or restored, or not later in the following month than the time such payments are normally issued under the county's customary fiscal procedure. An initial payment includes aid for prior months if retroactive aid is authorized because:

- 1. Aid was granted on appeal to the board of supervisors or the SSWB;
- 2. The SDSW concurs in a county recommendation that retroactive aid be paid to adjust an appeal (see Sec. _____, Stipulated Appeals);
- 3. An application or request for restoration for aid has been improperly denied and corrective action is being taken (see Sec. A-223, Beginning Date of Aid);
- 4. The investigation was not completed within 60 days after the application was signed or restoration requested. (See Appendix Fiscal Manual Sections, Sec. F-520, Federal Participation in Aid Payments.)

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A-225

AID PAYMENTS

Regulations

A-225 VENDOR PAYMENTS TO PUBLIC MEDICAL INSTITUTIONS

A-225

The full amount of the grant is paid directly to a recipient who is a patient in a public medical institution for the first two calendar months of hospitalization (i.e., no part of the grant is paid to the institution), if he enters the institution while he is a recipient. Hospitalization is considered continuous if a recipient is readmitted for the same ailment within 10 days of discharge.

If it appears that a patient will remain in a public medical institution, part or all of the grant is retained for payment to the institution after the end of the month in the following situations:

1. The patient entered the hospital as a recipient (i.e., the beginning date of aid precedes date of admission) and has remained therein for two months, or
2. Aid is granted or restored to a patient in the hospital.

None of the grant is to be paid to the institution if the recipient is not in the public medical institution at the end of the month. The grant or any portion thereof which has been retained for payment to the institution is paid to the recipient upon his leaving the institution or upon his transfer to a unit of the institution where he becomes an ineligible patient, e.g., custodial, mental disease or tuberculosis.

When all or part of the recipient's grant is to be paid to the institution, the distribution is authorized as follows:

1. If the recipient has no income, a direct payment to the recipient of \$13.50, and a vendor payment of \$71.50 to the institution,
2. If the recipient has income of less than \$13.50, a direct payment to him of the difference between his income and \$13.50 and the balance to the vendor,
3. If he has income of \$13.50 or more, his entire grant to the vendor.

(See Chapter 14 and Appendix Fiscal Manual Sections, Sec. F-310, Rules Governing Aid Payments and Sec. A-205.11, Special Need for Care in A Public Medical Institution and Sec. _____ Inter-County Transfers.)

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CALIFORNIA-SDSW-MANUAL-OAS

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Regulations	AID PAYMENTS	A-226
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A-226	CHANGES IN AMOUNT OF PAYMENT	A-226
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Whenever changes in the circumstances require a change in the amount of continuing payment, the appropriate increase or decrease is made effective as soon as possible. (See Sec. A-227.10, Adjustment Period.)

If the required change amounts to \$2 or less per month, such change is to be made as when other amounts are involved. Exception: Such a change which would continue for only one or two months is not to be made unless it is to allow for fluctuating or unpredictable medical needs. (See Secs. A-227.41, and A-227.61, Item 3, for adjustment, repayment, and payment of retroactive aid on overpayments and underpayments of \$2 or less.)

If a change in eligibility status, income or need is known in advance, any necessary change in the amount of payment is made effective with the month in which the changed circumstances will occur.

If a recipient's circumstances change to the extent that he no longer meets the eligibility requirements, aid is discontinued effective the last day of the month for which the last payment was made.

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A-226.10	AID PAYMENTS	Regulations
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A-226.10	WITHHELD PAYMENT	A-226.10
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A withheld payment is one which is held beyond the usual delivery date while information which raises reasonable doubt about eligibility or the correctness of the grant is investigated.

Reasonable doubt is considered to exist when:

1. A change in the recipient's circumstances occurs which necessitates a re-evaluation or a redetermination of facts as to eligibility and/or amount of grant;
2. New information from a presumably reliable source conflicts with previous information and the conflict has not been resolved;
3. Previously obtained information was overlooked or misinterpreted when determining eligibility and/or the amount of grant.

When reasonable doubt concerning eligibility or the correctness of the grant exists, necessary investigation is to be undertaken promptly and diligently. The next payment due may be withheld depending upon the county's evaluation of the circumstances. If the question is not resolved by the end of the first month following that in which it arose, the next payment is always withheld.

The recipient is to be notified immediately when a warrant is withheld beyond its usual delivery date for any reason other than death. Such notification is to include:

1. The reason for withholding the warrant.
2. A statement of what information, if any, is needed from the recipient or action required of him to re-establish his eligibility or to determine a correct grant.
3. Assurance that prompt investigation will be made and the withheld warrant delivered if he is found eligible to receive it.
4. Notification of the right to appeal.

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Regulations	AID PAYMENTS	A-226.12
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A-226.12	SUSPENSION OF AID	A-226.12
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Suspension of aid is the action required to be taken by the board of supervisors or a delegated agent authorizing withholding of payment beyond the month for which it was due. Such action is to be taken as soon as possible after the first of the month following that for which payment was first withheld. Suspension action constitutes authority to withhold payments for not more than three consecutive months.

If it is established before the end of the third month that the amount of aid was correct and there was eligibility to receive aid, the withheld payments are delivered immediately.

If the investigation establishes that aid should have been paid in a lesser amount, 1) the warrant is to be cancelled and aid authorized in the correct amount, or, 2) the withheld payment is to be delivered provided any overpayment which results can be completely adjusted within the adjustment period.

Aid is discontinued effective the last day of the month immediately preceding the first month for which payment was withheld, and warrants for the months for which payment was withheld are cancelled (see Appendix Fiscal Manual Sections, Sec. F-300, C), if investigation:

1. Establishes ineligibility to continuing aid and to the withheld warrants, or
2. Fails to resolve the question which raised reasonable doubt as to eligibility or correctness of the grant by the end of the third month for which payment was withheld.

If investigation establishes that the recipient was ineligible to certain of the withheld payments but eligible to others, the warrant(s) to which the recipient was ineligible is to be cancelled. (See Appendix Fiscal Manual Sections, Sec. F-300,C). When aid continues, such cancellation is not an interruption of the authorization for payment.

If investigation establishes that the recipient was eligible to a greater amount than the amount of the withheld warrant, a) the original warrant is released and retroactive aid is authorized as provided in Sec. A-227.60, or b) the original warrant is cancelled and proper amount authorized.

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A-227

AID PAYMENTS

Regulations

A-227

OVERPAYMENT AND UNDERPAYMENT

A-227

Overpayment occurs if a) the recipient was not entitled to payment because he did not meet eligibility requirements on the first of the month for which a payment was made, or b) he was eligible but the amount of the payment, together with the income received in that month, exceeded total need for that month (as determined in accord with Sec. A-221).

Underpayment occurs if, a) the applicant or recipient did not receive a payment for which his eligibility had been determined; or, b) he received a payment in an amount less than the maximum, which, together with income received in the month, was less than his total need for that month (as determined in accord with Sec. A-221).

A-227.10 ADJUSTMENT PERIOD

A-227.10

The adjustment period for a particular overpayment is the month of payment and the two months following (when the recipient continues eligible). An adjustable overpayment is to be adjusted to the greatest extent possible in the first of the two months following the month of overpayment. The amount to be adjusted is limited to the amount of overpayment occurring in the adjustment period. (These limitations are not applied if the grant offset method is used to liquidate repayment due from a currently eligible recipient who has liquid assets. See Sec. A-229, Grant Offset for Overpayment.)

Adjustment is to be made by discontinuance or decrease, or in lieu of such action, by a current cash adjustment in the amount which could have been adjusted by the discontinuance or decrease. (See Appendix Fiscal Manual Sections, Sec. F-400, B.)

A-227.20 RIGHT TO DEMAND REPAYMENT

A-227.20

The right exists to demand repayment in the amount which is unadjusted or unadjustable in the adjustment period if overpayment is due to failure of the recipient to report facts, unless he had no knowledge of the facts or was misinformed or not informed of his responsibility to report. (See Appendix Fiscal Manual Sections, Sec. F-410, Demand for Repayment.)

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Regulations	AID PAYMENTS	A-227.41
A-227.30	INVESTIGATION OF OVERPAYMENTS	A-227.30

When it appears that an overpayment may have occurred, a determination is made as to whether overpayment actually occurred. If so, the following determinations are made:

1. The period and amount of overpayment and what portion, if any, occurred after disclosure within the ability of the recipient, and what portion occurred because the recipient failed to report the facts.
2. The eligibility or grant factors which were involved. (If overpayment occurred because of excess property and the recipient failed to report the facts, a determination is made as to whether the facts were wilfully withheld or misrepresented or whether failure to report was due to the recipient's belief that they were immaterial to eligibility.)
3. The extent to which the overpayment can be adjusted by decrease or discontinuance within the adjustment period.
4. The amount of repayment due, if any.

A-227.40	ACTION ON OVERPAYMENTS	A-227.40
A-227.41	OVERPAYMENT DUE TO A CHANGE IN NEED AND/OR INCOME	A-227.41

1. When such overpayment occurred after disclosure of facts, or because the recipient had no knowledge of the facts, or because he was misinformed or not informed by the county, the overpayment is to be adjusted as fully as possible in the adjustment period. No repayment is to be demanded.
2. When such overpayment resulted from failure to report the facts and the recipient has no liquid assets, the overpayment is to be adjusted as fully as possible in the adjustment period. Demand is to be made for repayment of any unadjusted portion of the total overpayment. (See Sec. A-227.10 and Sec. A-229).

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A-227.42

AID PAYMENTS

Regulations

A-227.42 OVERPAYMENT DUE TO EXCESS PROPERTY

A-227.42

Excess personal property is the amount by which the market value of personal property (cash or sale value less encumbrances of record) exceeds the maximum.

Excess real property is that amount of the total market value (sale value less encumbrances of record) which is proportionate to the amount by which the total net assessed value exceeds the maximum.

1. When such overpayment occurred after disclosure of the facts or because the recipient had no knowledge of the facts, or because he was misinformed or not informed by the county, no adjustment is to be made if the recipient is currently eligible. No repayment is to be demanded.
2. When such overpayment resulted because facts were purposely withheld or misrepresented, the overpayment is the amount of aid paid for any month in which there was excess property on the first of the month. When the recipient has no liquid assets, the overpayment is to be adjusted as fully as possible in the adjustment period. Demand is to be made for repayment of any unadjusted portion of the total overpayment. (See Sec. A-227.10 and Sec. A-229.)
3. When such overpayment resulted from failure to report the facts because they were believed to be immaterial to eligibility, the amount of overpayment is the highest amount of the excess property on any day during the total period of ineligibility, or the amount of aid paid for such period, whichever is less.

The amount to be adjusted in the adjustment period is the highest amount of the excess property on any day within the month of overpayment, or the amount paid for such month, whichever is lesser. If overpayment occurred in two consecutive months and the facts are known in time to adjust in the overlapping adjustment month (and the following month, if necessary), the amount to be adjusted is the highest excess during the two consecutive months of overpayment, or the amount of aid paid for those months, whichever is lesser. Demand is made for repayment of any unadjusted portion of the repayment due for the total period of ineligibility.

A-227.43 OVERPAYMENT DUE TO FACTORS OTHER THAN NEED, INCOME OR PROPERTY A-227.43

1. When such overpayment occurred after disclosure of the facts, or because the recipient had no knowledge of the facts, or because he was misinformed or not informed by the county, no adjustment is to be made and no repayment is to be demanded.
2. When such overpayment resulted from the recipient's failure to report facts, the amount of overpayment is the amount of aid paid during the period of ineligibility. When he has no liquid assets, the overpayment is to be adjusted as fully as possible in the adjustment period. Demand is to be made for repayment of any unadjusted portion of total overpayment. (See Sec. A-227.10 and Sec. A-229.)

A-227.44 OVERPAYMENT DUE TO TWO INELIGIBILITY FACTORS

A-227.44

When a recipient is overpaid because two ineligibility factors exist concurrently, the total amount of repayment due is to be based on the single eligibility factor which resulted in the larger amount of repayment due.

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Regulations	AID PAYMENTS	A-227.61
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A-227.50 INVESTIGATION OF UNDERPAYMENTS A-227.50

When it appears that an underpayment may have occurred, a determination is made as to whether underpayment actually occurred. If so, the following determinations are made:

1. The period and amount of underpayment;
2. The amount of underpayment which can be corrected;
3. The amount of retroactive aid due, if any.

A-227.60 ACTION ON UNDERPAYMENTS A-227.60

A-227.61 PAYMENT OF RETROACTIVE AID A-227.61

Retroactive aid is aid authorized in a subsequent month for some preceding month or months.

1. When aid is granted upon appeal to the SSWB or when the SDSW concurs in a county recommendation that aid for prior months be paid (see Sec. _____, Stipulated Appeals) underpayment is adjusted by authorization of aid in the amount and for the period ordered by the SSWB or agreed to by the SDSW.
2. When underpayment occurs because aid was erroneously denied or discontinued and the erroneous action comes to the county's attention within 90 days after the date of notification to the applicant or recipient, retroactive aid is to be authorized before the end of the fifth month following that in which the erroneous action occurred, in the amount to which the person was eligible, and for the period during which he would have received aid had correct action been taken.
3. When aid is paid in the amount authorized but it is later determined that the recipient was eligible for a greater amount (as determined in accord with Sec. A-221) the underpayment is to be adjusted by payment of the additional amount due for the month provided that authorization action can be taken before the end of the fifth month following the month for which the recipient was underpaid. Exception: Underpayment of \$2.00 or less for a particular month is adjusted by payment of retroactive aid only when a necessary increase of \$2.00 or less in the continuing grant (see Sec. A-226, Changes in Amount of Continuing Payment) was not made effective until after the second month following that in which the changed circumstances were reported.
4. When, in a transferred case, the second county fails to authorize aid to begin on the date due, retroactive aid is to be paid by the second county.
5. When underpayment occurs because aid was not authorized in accord with the regulations governing the beginning date of aid, the underpayment is to be adjusted by payment of the amount due provided that authorization action can be taken before the end of the fifth month following the month in which aid should have begun.

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A-227.62

AID PAYMENTS

Regulations

A-227.62 CORRECTIVE PAYMENT

A-227.62

When underpayment occurred because payment for a particular month was erroneously made for less than the authorized amount, or when no payment was made although there was an authorized award in effect, the underpayment is to be corrected by delivery of payment in the authorized amount before the end of the second month following that for which payment was due.

A-227.63 DELAYED PAYMENT

A-227.63

When underpayment occurred because of delayed delivery of a payment due to a change of address of the recipient, a change of payee, or suspension action, underpayment is to be adjusted by release of the warrant before the end of the second month following that for which it was issued.

When underpayment in any amount occurs because an allowance for the cost of a fluctuating or unpredictable medical need is authorized in a subsequent month, the underpayment is adjusted by prompt payment of the amount due. (See Sec. A-207)

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Regulations

AID PAYMENTS

A-228

A-228

BALANCING OVERPAYMENTS AND UNDERPAYMENTS

A-228

Under certain circumstances, overpayment may be balanced against underpayment thereby reducing the overpayment which is otherwise subject to adjustment or repayment, and/or the underpayment for which retroactive aid would otherwise be required. For purpose of such balancing, the month in which the balancing determination is made and the two preceding months are considered the "current period."

Overpayment, which at the time it occurred, was not subject to adjustment or repayment is not to be balanced against any underpayment. Balancing of other overpayments and underpayments is limited to the following situations:

1. Overpayment in the "current period," if subject to adjustment in the adjustment period or to repayment, may be balanced against any underpayment for which payment of retroactive aid is currently required.
2. Overpayment in the period prior to the current period may be balanced against underpayment as defined in Sec. A-227 when:
 - a. The overpayment would have been adjustable in its adjustment period and the underpayment occurred in that adjustment period, or
 - b. The overpayment is subject to repayment and underpayment followed reporting of the facts and occurred prior to the "current period."

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A-229	AID PAYMENTS	Regulations
A-229	GRANT OFFSET FOR OVERPAYMENT	A-229
A-229.10	WHEN OFFSET IS USED	A-229.10
A recipient from whom there is a right to demand repayment but who is currently eligible and has liquid assets, may repay from his liquid assets or be permitted to liquidate repayment due by foregoing aid which would otherwise be paid to him. This grant offset method of repayment is used only if, a) the recipient possesses liquid assets at the time the amount of overpayment is determined in a sufficient amount to provide support at the rate of the grant which would otherwise be paid during the period of offset, <u>and</u>, b) the county has determined that it better fits the circumstances in the individual case and provides reasonable safeguard of public funds. This grant offset method of repayment is to be initiated or continued in transfer cases only if it appears reasonably certain that the full amount repayment due will be offset before the date the second county is due to assume responsibility for payment.		
A-229.20	LIQUID ASSETS	A-229.20
Liquid assets are those which are immediately available for support, i.e., cash or negotiable stocks and bonds.		
A-229.30	AMOUNT TO BE OFFSET	A-229.30
The grant offset method of repayment is applicable to the total repayment due, regardless of when the overpayment occurred; i.e., the limitations as to time and amount inherent in the use of the adjustment period do not apply. If the amount of repayment to be offset is less than the amount to which the recipient is currently eligible, a single monthly grant is decreased in the amount of the repayment due.		
A-229.40	OFFSET RESULTING IN DISCONTINUANCE	A-229.40
If the amount of repayment to be offset exceeds the amount of the grant to which the recipient is currently eligible, aid is discontinued. The recipient is advised in writing of the period over which he is expected to support himself from his liquid assets, and of his responsibility to keep a record of his needs and income during this period, to inform the agency promptly of these changes, or if there are other changes in his circumstances, and to report to the agency as often as required by the agency. The approximate period over which aid is to be discontinued to offset a repayment due is the number of calendar months determined by dividing the repayment amount, or the amount of liquid assets, whichever is lesser, by the amount of grant at the time of discontinuance. If a fractional month results, that portion which is allocable to a fractional month is deducted from the amount of aid otherwise payable in the month of restoration. A case in which the aid of a currently eligible recipient having liquid assets is discontinued to offset repayment due is to be controlled as any other collection account. When restoration is requested, the total aid which would have been payable during the period of discontinuance is to be determined on the basis of needs and income during the period of discontinuance. This amount is considered to be the amount of overpayment offset by discontinuance. If this amount is less than anticipated at the time aid was discontinued and the recipient is currently eligible, immediate repayment of the amount due is secured or the period of discontinuance is extended accordingly. If the recipient is ineligible for current aid for any reason, immediate effort is made to obtain repayment of any unadjusted balance of repayment due.		
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AD-110	AGENCY ELIGIBILITY FOR LICENSE	AD-110
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To be eligible for license, an adoption agency must conform to all applicable rules and regulations of the SSWB.

An agency will be considered for license only if there is no adoption placement service available in the community, or if the services provided by other adoption agencies are not sufficient to serve the parents applying for it or the children who are in need of it.

The agency must be able to provide, or there must be resources available in the community to provide, for financial assistance including medical and hospital expenses, for mothers who need it; for support of children accepted for study; for medical and psychiatric services for children as needed; and an adequate number of foster homes for children under study or awaiting adoption placement.

The agency must be coordinated with other community welfare services.

A. County Adoption Agencies

The agency must be designated by the county board of supervisors as the single public agency in the county through which adoption services will be offered.

B. Private Adoption Agencies

The agency must be organized and operated on a non-profit philanthropic basis.

AD-114	LICENSING PROCEDURE	AD-114
AD-114.1	APPLICATION FORMS	AD-114.1

Application for a license to conduct an adoption agency must be filed in duplicate with the SDSW on forms prescribed by the department.

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AD-114.2

ADOPTION AGENCIES
LICENSING

Regulations

AD-114.2 THE APPLICATION

AD-114.2

- A. Application from a public agency must be signed by the chairman of the board of supervisors, and a copy of the resolution of the motion of the board authorizing the chairman to sign the application and to enter into the necessary agreement with the SDSW must be attached.
- B. Application from a private agency must be signed by the presiding officer of the board of directors and the executive officer of the agency, if selected, or a second officer of the board of directors if the executive officer has not yet been appointed. A copy of the board authorization to its representative to apply for such a license must accompany it.
- C. Application must be accompanied by:
1. A written plan of operation in duplicate, covering the following:
 - (a) Statement of program goals and description of services.
 - (b) Administrative organization - narrative and chart of total agency.
 - (c) Personnel - number, qualifications, and duties.
 - (d) Physical facilities and office arrangement - diagrams.
 - (e) Forms and clerical system - samples.
 - (f) Budget and financing, by item.
 2. Statement of facts on which need for service was determined and plans for coordination with other community welfare services.
 3. List of membership of governing board and any advisory committee showing length of term and interest or qualifications on which selection was based and indicating which persons serve as officers and in which position.
 4. For the private agency, a copy of its constitution and by-laws and, if it is incorporated, a copy of the Articles of Incorporation.

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CALIFORNIA-SDSW-MANUAL-ADOPTION

Issue No. 1-9

Effective May 1, 1956

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ADOPTION AGENCIES
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AD-114.4 TERMS OF LICENSE

AD-114.4

Adoption services which a licensee may render are limited to those specified by the license.

AD-115 DELEGATION OF RESPONSIBILITY FOR INDEPENDENT
ADOPTIONS

AD-115

If the SDSW delegates responsibility to a public agency for the independent program, it must be shown on the license.

AD-116 AMENDED LICENSE

AD-116

Proposed major changes in program or organization shall be submitted to the SDSW for review and possible issuance of amended license.

AD-117 RENEWAL OF LICENSE

AD-117

An agency which has filed application for the renewal of its license within the time specified by law shall be deemed to be operating under a license of the SDSW until such time as the application has been acted upon.

AD-118 TERMINATION OF LICENSE

AD-118

License may be terminated by the SDSW for failure of the agency to meet the standards and regulations as defined in this manual. (See Sec. AD-142)

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Regulations	ADOPTION AGENCIES ORGANIZATION AND ADMINISTRATION OF AN ADOPTION AGENCY	AD-121
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AD-120	ADMINISTRATIVE RESPONSIBILITY FOR AN ADOPTION AGENCY - PUBLIC AND PRIVATE AGENCIES	AD-120
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Legal responsibility for an adoption agency or service shall be clearly defined and administrative authority specifically placed, in accordance with the regulations of the SSWB.

AD-121	CONSTITUTION AND BY-LAWS - PRIVATE AGENCIES	AD-121
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The agency shall have a constitution and by-laws setting forth its purpose, making provision for control by a responsible governing body.

The constitution and by-laws must contain the following information:

1. The name of the organization.
2. The purpose of the organization.
3. The relationship of the adoption service to the general membership, larger organization and/or auxiliaries, if any.
4. The location of the administrative authority for operation of the adoption program.
5. The powers and duties of the governing board.
6. The size, composition and method of selection of board and the terms of office established for its members.
7. The organization of the board, including the officers, the method of their selection, their term of office, and their duties.
8. The plan for regular meetings of the board and the number of members necessary for a quorum.
9. The methods of financing the agency or service.
10. The methods by which changes in constitution and by-laws can be effected.

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AD-122	ADOPTION AGENCIES ORGANIZATION AND ADMINISTRATION OF AN ADOPTION AGENCY	Regulations
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AD-122	GOVERNING BOARD - PRIVATE AGENCIES	AD-122
AD-122.1	MEMBERSHIP - PRIVATE AGENCIES	AD-122.1

Board members shall serve without compensation, but may be reimbursed for expenses.

No board member shall profit financially by reason of his membership nor be employed by the agency regularly either full time or part time.

Membership shall be distributed so that no single profession shall have control.

AD-122.2	METHOD OF SELECTION - PRIVATE AGENCIES	AD-122.2
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Members shall be elected by the supporting membership or by a representative body for a definite term of office. Provision shall be made for the replacement of members who become inactive.

AD-122.3	MEETINGS - PRIVATE AGENCIES	AD-122.3
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The board shall keep minutes of all its meetings and shall make them available for review by the SDSW.

AD-122.4	DUTIES - PRIVATE AGENCIES	AD-122.4
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The board shall formally adopt a written statement of its responsibilities to which the members agree.

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Regulations	ADOPTION AGENCIES ORGANIZATION AND ADMINISTRATION OF AN ADOPTION AGENCY	AD-124
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AD-122.5	COMMITTEES - PRIVATE AGENCIES	AD-122.5
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Provision shall be made for the appointment of standing committees and such temporary or special committees as are needed.

AD-122.6	RELATIONSHIP OF BOARD TO EXECUTIVE AND STAFF - PRIVATE AGENCIES	AD-122.6
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There shall be division of responsibilities between the board and executive in order that an efficient administration may be provided. The board shall delegate to the executive the responsibility for administration, but the board shall determine the major policies and the general plan of operation based upon its knowledge of agency problems and community needs. The general policy of the board shall be to include the executive at all regular meetings.

AD-123	FINANCES - PUBLIC AND PRIVATE	AD-123
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AD-123.1	PRIVATE AGENCIES	AD-123.1
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The agency shall be soundly financed to insure an adequate standard of service. An agency may solicit funds but this may not be a condition to placement of a child for adoption.

It shall have sufficient funds to provide the services which it offers and to provide continuing care for children relinquished to it who may require prolonged study or treatment before placement, children who may be returned to it prior to completion of the adoption, and relinquished children who cannot be placed for adoption.

The scope and size of the agency's services shall be so planned that adequate standards of service are maintained.

Policies and practices governing receipt and expenditures of money shall be in accord with sound budgeting, disbursement and audit control procedures. Financial records shall be maintained of receipts, disbursements, assets and liabilities.

AD-123.2	PUBLIC AGENCIES	AD-123.2
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In order for the state to reimburse the county for the administration of an adoption program, there must be a plan of operation developed by the agency and approved by the SDSW. Reimbursement shall be in accordance with the plan of operation and with the terms of the annual budget approved by the State Department of Social Welfare. Claims for administrative expenditures shall not include expenditures defined as adoption cost of care.

AD-124	FEES FOR ADOPTION SERVICE - PUBLIC AND PRIVATE AGENCIES	AD-124
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Any fees charged for service shall be based upon the cost of service and shall be defined as such at the time of application for service.

The maximum fee shall be approved in advance by the SDSW.

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ADOPTION AGENCIES
ORGANIZATION AND ADMINISTRATION OF AN ADOPTION AGENCY

Regulations

AD-126 PERSONNEL POLICIES AND PRACTICES - PUBLIC AND PRIVATE AGENCIES AD-126

Personnel policies and practices which will attract and hold competent, well-qualified staff, and stimulate professional growth, shall be formulated. Personnel policies shall be in writing and shall be available to staff.

AD-127 STAFF AD-127

AD-127.1 SELECTION AND TENURE OF STAFF - PUBLIC AND PRIVATE AGENCIES AD-127.1

Employment and tenure of position shall be based solely upon competence.

AD-127.2 NUMBER OF STAFF - PUBLIC AND PRIVATE AGENCIES AD-127.2

Professional and clerical staff shall be sufficient in number to perform the functions of the agency.

AD-127.3 QUALIFICATIONS OF STAFF - PUBLIC AND PRIVATE AGENCIES AD-127.3

All persons employed in professional social work positions in an adoption agency or a department of an agency performing adoption services shall be qualified for their responsibilities by training, experience, personality, character and health. Staff must meet the qualifications of the child placing agency standards. Specific qualifications for professional staff appear in sections below.

AD-127.4 THE EXECUTIVE AD-127.4

A. Responsibility - Public and Private Agencies

The executive is responsible for the operation of the agency and is held accountable for it. He may delegate his authority but not his responsibility.

B. Qualifications - Private Agencies

The executive shall have professional training in the field of child welfare or have demonstrated ability and leadership through experience as an executive in the field of child welfare.

When the organization of the agency may necessitate, the executive shall have such other qualifications as are required for the additional duties he may have to assume, such as supervision of casework.

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AD-127.5	CASEWORK SUPERVISORS - PUBLIC AND PRIVATE AGENCIES	AD-127.5
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A. Responsibility

Casework supervisor shall be employed to be responsible to the executive or his delegated assistant for the adequate performance of casework by designated staff members.

B. Qualifications

Casework supervisors shall be qualified by training and experience, the minimum of which shall be:

1. Successful completion of two years of graduate work in an accredited school of social work, and at least three years of experience in a casework capacity in the field of family or child welfare, at least one year of which should have been in the field of child placement, or
2. Successful completion of one year of graduate work in an accredited school of social work, at least three years' experience in a casework capacity in the field of family or child welfare, at least one year of which should have been in the field of child placement, preferably adoptions, and at least two years of experience in the capacity of casework supervisor; or
3. Successful completion of one year of graduate work in an accredited school of social work, and at least three years of experience in a casework capacity in the field of family or child welfare, at least one year of which should have been in the field of child placement, preferably adoptions, and demonstrated ability within the agency for promotion to casework supervisor.

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AD-127.6	ADOPTION AGENCIES ORGANIZATION AND ADMINISTRATION OF AN ADOPTION AGENCY	Regulations
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AD-127.6 CASEWORKERS

AD-127.6

A. Responsibility

Caseworkers shall be employed to carry out the agency's responsibility for case-work services.

These services include making social studies, planning and carrying out social treatment, home finding and casework with children, and the use of specialists and specialized services as necessary.

B. Qualifications

Caseworkers must have the following minimum qualifications:

1. Successful completion of two years of graduate work in an accredited school of social work, or
2. One year of graduate work in an accredited school of social work and at least two years of experience in the field of child welfare or family welfare, or
3. If one year of graduate work has not been completed, then the caseworker shall have had at least four years of paid experience in the field of child welfare or family welfare, at least two of which should have been in child placement.

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Regulations	ADOPTION AGENCIES AGENCY OFFICES AND RECORDS	AD-134
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AD-130	OFFICE FACILITIES FOR ADOPTION AGENCIES	AD-130
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The agency shall be housed in offices which are adequately equipped, which provide privacy for interviewing and which are conveniently located for the public.

AD-133	RECORDS, REPORTS AND STATISTICS	AD-133
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Current administrative records shall be maintained by the agency in such a form as to provide an index to all cases, including location of children under care, and including all foster homes in use.

Monthly statistical reports shall be submitted as required by the SDSW.

Copies of current policies as adopted by the board of the agency shall be submitted to the SDSW.

Such other records shall be maintained and reports submitted as may be required by the SDSW.

AD-134	CASE RECORDS	AD-134
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- A. The agency shall maintain a case record for each family unit or individual served in its adoption placement program.
- B. During the study process, the agency shall maintain a complete record on each independent case assigned to it for study and report. When the court report is filed and the case is closed, the record shall be returned to the SDSW, Sacramento, for permanent filing.
- C. Each case record shall contain a face sheet or application form, a written record of the study including medical and relevant psychological or psychiatric reports and correspondence, verifications and legal documents, evaluation of findings, court reports, decisions reached and action taken.
- D. All information in adoption case records shall be confidential. (See Sec. AD-415)

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ADOPTION AGENCIES
 AGENCY OFFICES AND RECORDS

Regulations

AD-135

CASE DOCUMENTS FILED WITH SDSW

AD-135

The following material shall be submitted by adoption agencies regarding children and applicants:

1. Children

- a. Notice of acceptance of child by the agency, whether for study or for care, (Form AD 550)
- b. A certified copy of the relinquishment or notice of procedure in lieu of relinquishment (Form AD 551-A) accompanied by a face sheet giving identifying information on the child and his family,
- c. Notification of placement for adoption or replacement which shall show the name of the child placed, date of placement, and the names of the couple with whom the child is placed, (Form AD 558)
- d. If the adoption of a child placed by the agency has been, or is being, completed outside the state, notice of the fact,
- e. If a relinquishment is rescinded after filing with the SDSW a copy of the agreement between the agency and the parent(s) rescinding it,
- f. Notice of removal of child from the adoptive home.

2. Applicants

Notice of application. (Form AD 552-A)

AD-136

FORMS AND FORM LETTERS

AD-136

The forms for relinquishment and consent are prescribed by the SDSW.

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CONTINUATION SHEET
**FOR FILING ADMINISTRATIVE REGULATIONS
 WITH THE SECRETARY OF STATE**
 (Pursuant to Government Code Section 11380.1)

	ADOPTION AGENCIES	
Regulations	AN AGENCY TERMINATING ITS ADOPTION SERVICES	AD-141

AD-140	CONTINUING AGENCY RESPONSIBILITY	AD-140
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An adoption agency is responsible for the care and support of any child for whom relinquishment has been accepted and filed until the child is adopted, dies, or reaches maturity, unless the relinquishment has been rescinded by mutual consent of the agency and the parent or parents. (See Sec. 224m and 224n, Civil Code)

An agency terminating an adoption service must:

1. Pay all financial obligations incurred by it.
2. Refund any fees collected for services not performed by the agency before its termination.
3. Retain or make available sufficient funds.
 - a. To provide for the support of all children for whom relinquishments have been accepted and filed with SDSW.
 - b. To provide for necessary staff to complete its services to all children for whom it has responsibility.
4. Retain staff adequate in number and for the period of time necessary to complete its services and discharge its obligations.

AD-141	COMPLETING CASEWORK SERVICES	AD-141
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The staff retained by the agency to complete its work will be responsible for completing services to its clients as follows:

1. For children in adoptive placement, supervision of the family until adoption can be approved and assistance in completing it.
2. For children relinquished but not placed or children needing replacement, placement for adoption, arrangements for placement through another agency or other permanent plan.

Care and supervision of a relinquished child may be transferred to another agency but the agency to which he was relinquished retains responsibility for him.
3. For children accepted for study or care but not relinquished, case-work services to the natural parents and the child until a suitable plan is arranged.
4. For expectant mothers accepted for service, help in obtaining service from other sources.
5. For adoptive applicants who are being studied or where homes have been approved but will not be used, referral to another agency if indicated. Social data and evaluation should be made readily available to other agencies on authorization of the applicant.
6. Services initiated on closed cases should be completed.

CALIFORNIA-SDSW-MANUAL-ADOPTION

Issue No. 1-39

Effective May 1, 1956

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AD-142	ADOPTION AGENCIES AN AGENCY TERMINATING ITS ADOPTION SERVICES	Regulations
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AD-142	CASE RECORDS OF TERMINATED ADOPTION SERVICES	AD-142
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The full case records on all completed adoptions, placements for adoption, and children relinquished for adoption shall be sent to the SDSW for permanent filing and reference. This will include records and documents regarding natural parents, child, and adoptive parents. (See Sec. AD-118)

Case records or material or documents, submitted by natural parents or adoptive applicants without expectation of return and those cases terminated without placement may be destroyed, but full identifying information and dates of service shall be indexed and filed with the SDSW. (See Sec. AD-118)

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Regulations RELINQUISHMENT ADOPTIONS
PROGRAM IN AN ADOPTION PLACEMENT AGENCY AD-213

AD-210 AGENCY PROGRAM AD-210

An adoption agency program shall be centered on finding homes for children for whom adoption appears to be the best plan. In accomplishing this, services are given to natural parents and their children and to adoptive applicants.

AD-211 AGENCY STANDARDS OF SERVICES AD-211

The processes of intake, placement, supervision, and termination of care shall be in accord with accepted social case work standards and the standards of child care and placement as approved by the SSWB.

AD-212 CASE RECORDING AD-212

There shall be a written narrative record containing information which will be used to substantiate decisions and plans of action.

AD-213 ACCEPTABLE MEDICAL REPORTS AD-213

Medical examinations and reports shall be completed by doctors who are licensed as physicians and surgeons.

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Regulations	RELINQUISHMENT ADOPTIONS NATURAL PARENTS AND CHILDREN	AD-224
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AD-220	INTAKE POLICIES	AD-220
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The agency shall accept for service only those children for whom it is free to select adoptive parents.

AD-222	SERVICES AND STUDY - NATURAL PARENTS	AD-222
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The agency shall provide adequate services to natural parents, including casework service and referral to other agencies when indicated, and shall see that help is given to parents in making the best plan for the child and themselves.

The agency shall make a study of the natural parents relinquishing a child for adoption. The study shall include identification, personality and temperament, background information, religion and religious preference for the child, health, marriages, other children and other relevant data which will be helpful in planning for the child.

The agency shall verify marriages and dissolution of marriages including the marriage of parent or parents at time of child's birth; previous marriages of mother, and termination of each by death, divorce or annulment; first marriage of mother subsequent to child's birth.

Medical reports shall be secured; the report from the obstetrician should include a blood test for syphilis and a statement regarding any complications of pregnancy or birth.

AD-223	SERVICES AND STUDY - THE CHILD	AD-223
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The agency shall provide casework services and care for children accepted by it, including preventive and remedial medical care.

The agency shall make a careful study of each child accepted for adoption service to determine his needs and capacities and to relate them to choosing the family which can offer the best setting for his growth and development. The study shall include identification; developmental history and evaluation of it in relation to life experience, school data and religious affiliation.

The agency shall obtain the birth certificate of the child as soon as possible.

The agency shall obtain complete information regarding the legal status of the child.

The agency shall obtain medical reports as needed.

AD-224	AUTHORIZATIONS FOR RELEASE OF INFORMATION	AD-224
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Authorizations for the release of medical and social information shall be obtained from natural parent(s) or from persons who are able to act for the child.

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AD-225	RELINQUISHMENT ADOPTIONS NATURAL PARENTS AND CHILDREN	Regulations
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AD-225	AUTHORIZATION FOR MEDICAL CARE	AD-225
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Authorization for medical care to the child shall be obtained from the parent or from persons able to act for the child prior to relinquishment.

AD-226	PREADOPTIVE CARE	AD-226
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- A. An agency shall not accept a child for care until the parent(s) or a person or agency who can act for the child has expressed their interest in adoption.
- B. Any facility used to provide foster care shall be licensed or approved in accordance with the standards and procedure of the SDSW.
- C. Preadoptive foster care shall not be continued unnecessarily or indefinitely.
- D. The agency shall be responsible for carrying out policies in the use of foster care facilities as set forth in the Standards for Child Placing Agencies.

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CALIFORNIA-SDSW-MANUAL-ADOPTION	Issue No. 2-8	Effective May 1, 1956
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Regulations	RELINQUISHMENT ADOPTIONS RELINQUISHMENT	AD-237.4
AD-230	PREREQUISITES TO RELINQUISHMENT	AD-230
Prior to accepting a relinquishment the agency shall determine that parent(s) understands the content and effect and has chosen the plan of adoption for the child and that the child can be freed for adoption.		
AD-231	ACCEPTANCE OF RELINQUISHMENT	AD-231
A relinquishment shall not be accepted until after the child is born and the mother has left the hospital.		
AD-237	RELINQUISHMENT FORMS	AD-237
A relinquishment must be on a form prescribed by the SDSW.		
AD-237.1	RELINQUISHMENT-CONTENT	AD-237.1
A. The name of the agency as licensed by the SDSW shall be on the relinquishment at the time it is signed.		
B. The child shall be identified by name, sex, birth date, and place of birth.		
AD-237.4	RELINQUISHMENT - CORRECTIONS OR ALTERATIONS	AD-237.4
After a relinquishment has been signed it shall not be corrected nor altered unless the corrections and/or alterations are initialed by the parent signing the document and by the authorized official of the agency before whom the relinquishment was acknowledged.		

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Regulations	RELINQUISHMENT ADOPTIONS WORK WITH APPLICANTS FOR CHILDREN	AD-245.2
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AD-241	ACCEPTANCE OF APPLICATIONS	AD-241
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- A. Agencies shall accept applications only from persons living in the geographical area covered by the agency's license. Exceptions may be made to meet the needs of children for whom suitable parents cannot be located in the agency's area.
- B. An agency shall not accept an application:
1. From a couple for a specific child. Exception may be made only when necessary in order to meet the needs of a particular child.
 2. From a single person, whether unmarried, widowed, or divorced.

AD-241.1	APPLICATION - PREREQUISITE TO STUDY	AD-241.1
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An application signed by both applicants shall be on file in an agency before a study is undertaken.

AD-245.1	INTERVIEWS DURING STUDY	AD-245.1
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There shall be at least four interviews with applicants before the family is approved. This number may include the intake interview, two with the couple together, and one with each of them separately. At least one of the interviews with the couple shall be in their own home. If there are other members of the family, including children, they shall be interviewed.

AD-245.2	AUTHORIZATIONS	AD-245.2
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Authorizations shall be obtained from the applicants for release of medical, social, and employment information.

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AD-245.3

RELINQUISHMENT ADOPTIONS
WORK WITH APPLICANTS FOR CHILDREN

Regulations

AD-245.3 CONTENT OF STUDY

AD-245.3

A study and evaluation of applicants shall be made before they are approved for the placement of a child. The study shall include age, nationality and race; motivation for adoption; preferences for a child; capacities and attitudes; personal relationships and personality; marriages, health, employment and finances, religion, education, environment.

The present marriage and all previous marriages and terminations of marriage shall be verified.

Medical reports on each applicant including chest X-rays and blood tests for syphilis shall be required. Exception may be made only when the agency waives the reports for members of religious groups who depend upon faith and prayer for healing.

If a child is not placed within a year or if there are indications of health problems, a re-examination shall be required before placement is made.

The applicant's current employment shall be verified.

If an applicant is foreign born, there shall be verification that he is in the United States legally.

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CALIFORNIA-SDSW-MANUAL-ADOPTION

Issue No. 2-34

Effective May 1, 1956

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Regulations	RELINQUISHMENT ADOPTIONS PLACEMENT AND SUPERVISION	AD-252
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AD-251	FACTORS IN PLACEMENT	AD-251
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No child shall be placed for adoption until he is legally free, unless it is necessary for his welfare, and until the agency believes that he can develop in an adoptive home.

AD-252	SELECTION OF ADOPTIVE PARENTS FOR CHILD	AD-252
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In choosing adoptive parents for a child the agency shall select from its approved applicants the family which is best able to meet his needs.

The child shall be placed with adoptive parents whose religious faith is the same as his own or that of his parents. Exception can be made in accordance with the expressed wishes of the parent(s).

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AD-256

RELINQUISHMENT ADOPTIONS
PLACEMENT AND SUPERVISION

Regulations

AD-256

PLACEMENT AGREEMENT BETWEEN THE AGENCY AND THE ADOPTIVE COUPLE

AD-256

After a decision is reached by the agency and a couple regarding the placement of a child, the agency and the couple shall enter into an agreement covering the rights and responsibilities of each during the placement.

AD-257

SUPERVISORY PERIOD AFTER PLACEMENT FOR ADOPTION

AD-257

There shall be an interim period between the placement and the final adoption, during which the agency will provide casework services to the family. This period shall normally be one year. It shall not be less than six months unless a reduction is necessary in order to protect the welfare of the child in which event the approval of the SDSW shall be obtained.

There shall be at least four interviews with the couple during the supervisory period, two of which shall be in the home with the child and both parents.

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Regulations	RELINQUISHMENT ADOPTIONS COURT PROCEEDINGS AND COMPLETION OF ADOPTION	AD-266
AD-261	AGENCY CONSENT TO ADOPTION If the agency approves the adoption, it shall join in the petition and shall give its consent.	AD-261
AD-263	COURT REPORT BY AGENCY The agency shall file with the court a report on any petition which may be filed for a child relinquished to it and placed for adoption by it.	AD-263
AD-264	PLEADING BY AGENCY If a petition for the adoption of a relinquished child is filed by a person(s) with whom the agency has not placed him for adoption, the agency shall file a pleading with the court asking that the petition be dismissed.	AD-264
AD-266	CERTIFICATE OF ADOPTION The agency shall complete the Certificate of Adoption and file it with the county clerk.	AD-266

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CONTINUATION SHEET
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Regulations	INDEPENDENT ADOPTIONS THE STUDY	AD-323
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AD-321	TIME ALLOWED FOR STUDY AND REPORT	AD-321
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The study process shall be initiated immediately on receipt of the assignment from the SDSW Bureau of Adoptions or of an endorsed copy of the petition.

The study shall be completed by the due date, unless an extension of time has been granted by the court.

AD-322	THE ADOPTIVE HOME	AD-322
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There shall be as many interviews with the adopting parents and other persons as are necessary, but there shall be at least one home interview with the adopting parents and the child. If at the time the report is submitted, more than three months have elapsed since the last contact with the adopting parents another contact must be made.

AD-322.1	CONTENT OF THE STUDY	AD-322.1
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There shall be a study of the petitioners to determine their suitability as adoptive parents for the child. The study shall cover how placement was made; acceptance of adoption, personal adjustment, marriage, family relationships, understanding of the needs of children, plans and opportunities for the child's social development, religious training, education, health, housing, and financial resources.

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A medical report of an examination of each adopting parent made within a year of the filing of the report shall be obtained. This shall include serological tests and chest X-rays. If the adopting parents and the child and/or the child's parents are members of a religious sect, denomination, or organization which, in accordance with its creeds or tenets, relies upon faith and prayer for healing, and the parents have consented to the adoption by the petitioners as members of such sect, denomination, or organization, the usual requirement for medical examination may be waived.

AD-323	THE CHILD	AD-323
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There shall be a study of the child which shall include his background, his development, his health, including necessary examinations and reports, and his adjustment in the home of the adopting parents.

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AD-324

INDEPENDENT ADOPTIONS
THE STUDY

Regulations

AD-324 THE PARENTS

AD-324

Information shall be obtained from the parent(s) regarding the child and his background, their plans for the child, and their attitude toward the adoption and consent. There shall be as many contacts with them as are necessary.

AD-325 THE NARRATIVE RECORD

AD-325

There shall be a written narrative record containing information which will be used to substantiate decisions and plans of action.

AD-327 MEDICAL REPORTS AND EXAMINATIONS

AD-327

Medical examinations and reports on the child and the adopting parents shall be completed by a doctor who is licensed as a physician or surgeon.

AD-328.1 AUTHORIZATIONS

AD-328.1

Authorizations for the release of medical, social, and current employment information, shall be obtained from the adopting parents. Authorizations shall be secured from the natural parent(s) for the release of medical and social information, and to authorize the adopting parents to provide medical and surgical care for the child.

AD-328.2 VERIFICATIONS

AD-328.2

There shall be verification of the current marriage, previous marriages, and any dissolution of marriage of the adopting parents, and of the natural parent(s) who claims custody of the child. The adopting parents' current employment shall be verified and, if either adopting parent was foreign-born, the fact that he is in the United States legally shall be verified.

AD-329.8 VERIFICATION OF REMOVAL OF CHILD FROM ADOPTIVE HOME

AD-329.8

In cases of denial or dismissal when the child has reportedly been removed from the adoptive home by his parents, the fact that he is no longer in the home shall be verified before filing an incomplete report.

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Regulations	INDEPENDENT ADOPTIONS OTHER PROCESSES RELATED TO STUDY	AD-333
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AD-332	CONCURRENT PETITIONS	AD-332
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In the case of concurrent petitions pending for the adoption of a child the agencies shall exchange information on their studies and agree as to the best plan for the child.

AD-333	EXTENSION OF TIME	AD-333
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A formal request shall be made to the court for any extension of time with copy to the attorney for the adopting parents. If an extension is granted the report shall be filed by the new due date.

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Regulations	INDEPENDENT ADOPTIONS CONSENT	AD-345.5
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AD-341	TAKING CONSENT	AD-341
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The agency shall not take the parent's consent until after the petition has been filed. The mother's consent shall not be taken by the agency while she is still in the hospital nor until she has recovered sufficiently from the child's birth to make a decision.

AD-345.2	CONTENT OF CONSENT	AD-345.2
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The full names of the adopting parents shall appear on the consent at the time the parent signs the form. The agency representative shall not cover the names.

The consent signed by a natural parent agreeing to the adoption of a child by a married couple shall not be used in completing the adoption by one of them alone.

AD-345.5	CORRECTIONS OR ALTERATIONS ON CONSENT	AD-345.5
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The signed consent shall not be corrected nor altered unless the corrections or alterations are accepted and initialed by the parent signing the document and initialed by the worker who witnessed the signature.

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Regulations	INDEPENDENT ADOPTIONS THE COURT REPORT	AD-364
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AD-361	FILING	AD-361
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The court report on an adoption petition shall be filed by the due date.

AD-362	CONTENT	AD-362
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The court report shall contain a summary of the pertinent facts disclosed by the study, an evaluation of these, and a recommendation as to the granting of the petition. The information which is included in the report shall be current and shall be substantiated in the case record.

AD-364	SUPPLEMENTAL REPORTS	AD-364
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Supplemental reports shall be filed as necessary.

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Regulations	INDEPENDENT ADOPTIONS COURT PROCEEDINGS AND COMPLETION OF ADOPTION	AD-372
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AD-370	SETTING THE CASE FOR HEARING	AD-370
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If a hearing is necessary following a recommendation of denial, the agency shall be responsible for having the case set for hearing.

AD-372	CERTIFICATE OF ADOPTION	AD-372
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Whenever a recommendation of approval is made, the agency shall prepare the Certificate of Adoption and shall transmit it with the court report to the county clerk.

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Regulations	SUPPLEMENTARY INFORMATION CASE FILES, RECORDS AND REPORTS	AD-415
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AD-415	CASE RECORDS CONFIDENTIAL	AD-415
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The confidentiality of case records shall be maintained. Information from case records can be released only to those agencies specified in the law, parties to the adoption or their legal counsel, or persons authorized to receive it. (See Sec. AD-133, D)

Records shall not be produced in court on request of any of the parties except on subpoena.

Records shall be made available to inspection by grand juries only on order of the court. (See Sec. AD-133, D, Regulations)

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(Pursuant to Government Code Section 11380.1)

WIC 115, 116, 1559, 1560

GEORGE K. WYMAN
Director

GOODWIN J. KNIGHT
Governor

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14
March 30, 1956

DEPARTMENT BULLETIN NO. 526 (ANC)

TO: COUNTY WELFARE DEPARTMENTS
COUNTY BOARDS OF SUPERVISORS
COUNTY AUDITORS
SAN FRANCISCO PROBATION DEPARTMENT
LOS ANGELES PROBATION DEPARTMENT

Subject: Payments for Children in
Boarding Homes and Institutions

Effective May 1, 1956, Aid to Needy Children payments for children in boarding homes and institutions shall be governed by the following:

1. Payments shall be made to the boarding home or institution subsequent to the furnishing of care and support.

If payments have previously been made in advance to the same payee (boarding home or institution), the county shall explain the new policy and secure agreement as to the month in which the change in policy can be made effective with minimum hardship to the payee.

The case record shall indicate clearly the agreement reached with the payee including the month in which payment will be adjusted to effect conformity with this policy.

2. If a child is eligible for Aid to Needy Children on the first day of the month and becomes ineligible as a result of change in age, income, property, deprivation status, etc., on some subsequent day during the month, he is entitled to payment for the entire month if he remains in the boarding home or institution.

If the child has been placed in the boarding home or institution by the county, his ineligibility to Aid to Needy Children shall be made known to the payee immediately and agreement should be reached as to the on-going plan for the child.

3. If a child permanently leaves or is removed from a boarding home or institution before the end of the month, the Aid to Needy Children payment shall be prorated on the basis of the number of days the child remains in the boarding home or institution, unless the county determines that special circumstances exist. In this case, additional payment may be made not to exceed the total boarding home rate for

These Regulations are designated to become effective MAY 1 '56

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(Pursuant to Government Code Section 11380.1)

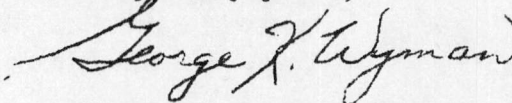
the balance of the month. Such special circumstances would include an inequitable situation where sufficient advance notice had not been given of the child's removal; allowable expenditures made within the month on behalf of the child for clothing or other personal or special needs; allowable expenditures already planned by the agency and boarding home; etc.

4. If a child temporarily leaves or is removed from a foster home or institution, payment may be made during the period when the child is absent from the boarding home or institution as follows:
 - a. Full payment may be made for a period not to exceed one full month in addition to the balance of the month in which the child leaves the home if the plan is for the child to return to the same foster home or institution.
 - b. Payment for the child's continuing needs not met by the hospital or otherwise for a child in a boarding home or institution who has entered a public hospital shall be paid for a period not exceeding two months.
5. The county shall substantiate in the record the need for any payments made beyond the day the child leaves a foster home or institution.
6. State participation is available only up to the statutory maximum for the total payments made on behalf of a child for any one month even though, as in the case of a child removed from one home and placed in another, overlapping payments result from payment to the first boarding home or institution beyond the day of removal.

To avoid misunderstanding by foster parents and institutions and to place the practice of the agency on a business-like basis, it is suggested that each county develop a written statement which clearly defines the terms of the financial arrangements under which each child is placed. Form BHC 53.1 entitled "Financial Agreement Child Placed by Agency in Foster Home" is available for documenting the rate of payment to be made. (BHC 53.1 can also be adapted for use when a child is placed in an institution.) Attached to the copy of the BHC 53.1 which is given to the foster parent or institution should also be the statement which reflects the principles set forth in this bulletin. Attached is a statement which can be used as a guide in developing a form of this type.

This bulletin obsoletes any current conflicting manual provisions relating to Aid to Needy Children payments for children in boarding homes and institutions.

Very truly yours,



George K. Wyman
Director

Attachments

DEPARTMENT BULLETIN NO. 526 (ANC)
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FOR FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE

(Pursuant to Government Code Section 11380.1)

CONDITIONS OF PAYMENT OF ANC FOR CHILD IN FOSTER CARETo _____
Foster Parents or InstitutionThe policy of the _____
Name of Agency

as it relates to the payments to be made to reimburse you for the care of foster children placed in your home or institution and to provide funds to meet the personal needs of the children is as follows:

1. You will receive payment on or shortly after the first of the month following the month in which care is given.
2. If a child is permanently removed from your home or institution, payment for care will be made through the last night the child spent in the home or institution, except that under special circumstances a plan may be made whereby you will receive additional payment not to exceed the total boarding home or institution rate for the balance of the month. For example, if you have made allowable expenditures for the child within the month of removal, or if you and your worker have already planned necessary expenditures for clothing, medical care, personal items, etc., for the child, it may be possible to include these items in your payment.
3. If the child is absent from your home or institution because of hospitalization, a visit to parents or relatives or some other plan of care made by the agency or the child's parents, and if the plan is for the child to return to your home or institution, a plan may be made, under some circumstances, whereby you receive full payment for the cost of the child's care for a period not to exceed one full month in addition to the balance of the month in which the child leaves your home or institution.
4. If the child is hospitalized in a public hospital, the agency will assume responsibility for the child's continuing needs which are not met by the hospital for a period not exceeding two months.

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CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE

(Pursuant to Government Code Section 11380.1)

State of California

Department of Social Welfare

FINANCIAL AGREEMENT
CHILD PLACED BY AGENCY IN FOSTER HOME

(To be completed in duplicate at time of placement, one copy to be given to foster parents,
one copy to be retained by the agency.)

The _____ will pay to _____
(Agency) (Names of Foster Parents)

_____ the sum of \$ _____

per _____, for the care of _____
(Name of Child)

Payment will be made on _____ to cover the _____
(Day of Month) (preceding/coming)

month. This sum will include the payment of \$ _____ for food, shelter, care and
supervision, and the following amounts: \$ _____, \$ _____,
(Clothing) (Personal Needs)

\$ _____, and \$ _____
(Allowance for Recreation, Education and Incidentals) (List other items to be

covered)

Other expenses or needs will be met by the agency under the following conditions:

Payment will be made effective on _____, and will continue until other
(Date of Placement)

arrangements are made for the care of this child, or a new agreement is signed.

The amount to be paid is subject to change by mutual agreement.

Signature of Agency Representative _____

Title _____

Agency _____

Signature of Foster Parents _____

Date: _____

Form BHC 53.1, October 1954

These Regulations are designated to become effective MAY 1 1956

FACE SHEET
**FILING ADMINISTRATIVE REGULATIONS
 WITH THE SECRETARY OF STATE**
 (Pursuant to Government Code Section 11380.1)

RECEIVED FOR FILING

APR 27 1956

Division of Administrative Procedure

ENDORSEDAPPROVED FOR FILING
(GOV. CODE 11380.2)

APR 27 1956

Division of Administrative Procedure

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Copy below is hereby certified to be a true and correct copy of regulations adopted, or amended, or an order of repeal by:

State Department of Social Welfare

(Agency)

Dated: April 26, 1956

By:

Director

(Title)

FILEDin the Office of the Secretary of State
of the State of California

APR 27 1956

At 12:12 o'clock P.M.

FRANK M. JORDAN, Secretary of State

By: Assistant Secretary of State

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C-240 DEFINITION OF DEPRIVATION OF PARENTAL SUPPORT OR CARE BY REASON
 OF CONTINUED ABSENCE FROM THE HOME

C-240

A child shall be considered deprived of parental support or care if there is continued absence from the home on the part of one or both parents, except that in cases in which the natural father, the stepmother, and child are living together, there is not eligibility for ANC because of the absence of the natural mother.

Continued absence from the home exists if:

1. There is a clear dissociation of one or both parents from the normal family relationship. Dissociation is not considered to exist if the parent is absent solely for the purpose of looking for work, working in another locality, serving in the armed forces, visiting or moving to another community.

or

2. One parent is not legally able to return to the home. A parent is not legally able to return to the home under the following circumstances:
 - a. The parent has been confined in a penal or correctional institution (including road camps and county jails).
 - b. The parent is a foreign national who has been deported by immigration authorities or has voluntarily left the country because of the threat of deportation or the knowledge that he was subject to deportation.

Continued absence from the home exists if the absent parent has been out of the home at least three months prior to the date of application in the following situations:

1. The parents are separated and there is no legal action confirming it.
2. One or both parents have deserted.

Continued absence from the home exists from the time the absent parent leaves the home in the following situations:

1. The parents are divorced or divorce action has been filed and the parents are living separate and apart.
2. The parents are separated and a separate maintenance action has been filed; or an injunction has been issued forbidding a parent from visiting his spouse or children, or both.
3. The marriage of the parents has been annulled.

(Continued)

These Regulations are designated to become effective JUN 1 '56

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

C-240 (Continued)

C-240

4. The parents of the child are not married to each other and had not maintained a home together.
5. A parent is confined in a penal or correctional institution.
6. A parent who is a foreign national has been deported or has voluntarily left the country because of the threat of deportation or the knowledge that he was subject to deportation.

If the parents are maintaining a home together but the child is living elsewhere, whether placed by the parents, by an authoritative agency, or by an agency acting on behalf of parents, the child shall not be considered to be deprived of parental support or care due to absence of a parent from the home.

Visits of an absent parent to the home to see the child, or his contributions to the support of the child, would not affect eligibility on the basis of deprivation of parental support or care. Contributions made by the absent parent shall be considered as income in determining need.

Visits of short duration of the mother or children to see a deported father would not affect eligibility on the basis of deprivation of parental support or care.

If an absent parent returns to the home, he may be unable to assume at once his full responsibility for the child's support or care. Discontinuance of assistance immediately might make family readjustments more difficult and create hardships for the child. Assistance shall be continued as long as necessary but not to exceed three monthly payments after the parent's return. During this period, the county is expected to help the family work out plans for future management. For example, a father who has been absent from the home because of imprisonment or deportation; and returns home can no longer be considered to be absent from the home. However, the effect of his absence may continue for a period while the family finds housing adequate for an additional member and makes the move and while the father finds employment and begins to receive an income for the support of the family. Assistance in meeting the financial needs and in making family readjustments will strengthen family ties and minimize hardships for the children. In no event shall financial assistance be continued after three monthly payments subsequent to the parent's return, even though need continues.

(W&IC 1500, 1560)

These Regulations are designated to become effective JUN 1 '56

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CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

C-250 DEFINITION OF DEPRIVATION OF PARENTAL SUPPORT OR CARE
BY REASON OF PHYSICAL OR MENTAL INCAPACITY

C-250

(Repealed)

C-255 DETERMINATION OF DEPRIVATION OF PARENTAL SUPPORT OR CARE
BY REASON OF PHYSICAL OR MENTAL INCAPACITY

C-255

(Repealed)

These Regulations are designated to become effective JUN 1 '56

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FILING ADMINISTRATIVE REGULATIONS WITH THE SECRETARY OF STATE

(Pursuant to Government Code Section 11380.1)

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MAY 31 1956

Division of Administrative Procedure

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MAY 31 1956

Division of Administrative Procedure

Copy below is hereby certified to be a true and correct copy of regulations adopted, or amended, or an order of repeal by:

State Department of Social Welfare

(Agency)

Dated: May 29, 1956

By: *George J. Wyman*

Director

(Title)

FILED

in the Office of the Secretary of State
of the State of California

MAY 31 1956

At 10 o'clock A.M.

FRANK M. JORDAN, Secretary of State

By: *Frank M. Jordan*
Assistant Secretary of State

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074-15 PROVISIONAL APPOINTMENTS
WPS

074-15

If, in the opinion of the appointing authority, there are urgent reasons for filling a position and the appropriate employment lists are exhausted, the appointing authority may submit to the examining agency, on Form PS-9 (Application for Examination) the name and qualifications of the person to fill the position pending examination and establishment of an eligible list. If such person's qualifications have been certified by the examining agency as meeting minimum requirements as to training and experience for the position, and he is a citizen of the United States, such person may be provisionally appointed to fill the existing vacancy only until an appropriate eligible list is established and appointment made therefrom. No provisional appointment shall be made until the position has been classified and minimum qualifications established therefor, in accordance with these rules. No provisional appointment shall be continued for more than 60 days after an appropriate eligible list has been established for the class of position and in no event for more than six months from the date of appointment; except that if a provisional employee has filed a relevant examination appeal which is granted a hearing by the SSWB, his appointment may continue during the pendency of such appeal in accordance with the provisions of the rules governing provisional appointments. Successive provisional appointments of the same person shall not be permitted and a position shall not be filled by repeated provisional appointments. Expiration of a provisional appointment shall be reported to SDSW on Form PS-21 (Report of Separation).

The period of provisional appointment shall not constitute a part of the probationary period except as provided in Sec. 074-50, Nature, Purpose and Duration of Probationary Period. Employees not covered by Sec. 074-10, Employees Appointed Prior to Adoption of These Rules, and all appointments made subsequent to the adoption of these rules but prior to the holding of examinations, shall be regarded as provisional employees.

For the purpose of this section and as long as recruitment difficulties persist, provisional appointments may be extended at the end of the six months' period with the approval of the SDSW, and successive provisional appointments of the same individual to different positions and successive provisional appointments to the same position may be made in exceptional circumstances subject to the following conditions.

1. That an examination has been publicly announced or will be announced by the examining agency prior to a date not exceeding six months after the beginning date of each provisional appointment, or that if after an examination has been announced the examining agency has found that a sufficient number of applicants has not filed to assure adequate competition.
2. That in the absence of a definite examination date, provision shall be made to accept continuous receipt of applications for an examination for a given class as outlined in Sec. 071-80, Filing Applications, and the examination is to be held whenever the examining agency, with the concurrence of the SSWB, finds that enough applicants have filed to assure adequate competition.

(Section Continued on Next Page)

CONTINUATION SHEET
**FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE**
(Pursuant to Government Code Section 11380.1)

074-15 (Continued)

074-15

3. That, where there is an established eligible list for a given classification but there are no immediately available eligibles for appointment, the SDSW may approve the extension of a provisional appointment in accordance with the provisions outlined under (1) and (2).

A permanent or probationary employee who has accepted a provisional appointment in a higher class shall, if he so desires, at the termination of the provisional appointment be reinstated to his former position, in accordance with Sec. 076-20, Reinstatement to Previous Class of Position.

Notwithstanding any other provisions of these rules, successive provisional appointments of the same person shall not be permitted under any of the following conditions:

1. If the provisional appointee has failed to participate or to qualify in two successive administrations of the examination for his class.
2. If the appointing authority fails to contact the eligibles on the list for the class in which the provisional appointment exists.
3. If there is any available eligible who will accept the conditions of employment offered.

(W&IC 119.5, 119.6; FSS-Admin)

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These Regulations are designated to become effective JUL 1 '56

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

B-279 EXPENSES IN CONNECTION WITH EYE OR
NEUROPSYCHIATRIC EXAMINATIONS

B-279

No person shall be required to pay any part of the cost of an eye examination that is required by the SDSW in connection with his application for, or continued receipt of, aid. The cost of any examination required by the SDSW for the purpose of determining degree of blindness shall be paid by the county in the same manner as other expenses of the county are paid. The maximum fee which is considered proper county administrative expense for each eye examination is \$15. Exception: In cases of conflict in eye examination reports where an additional or "referee" examination and report is required, a fee of \$20 is a proper administrative expense.

A reasonable fee for a neuropsychiatric examination, if required, may be considered an allowable county administrative expense. (See Sec. B-264, Neuropsychiatric Examinations.)

Necessary transportation expenses are allowable within the county for eye examinations by physicians or optometrists on the lists, or outside the county if there is no examiner (physician or optometrist) in the category chosen by the individual listed for that county. In ANB, necessary transportation expenses are subject to federal reimbursement. (See Sec. B-249, Determination of Degree of Blindness, and Appendix, Sec. F-875, Expenditures for Examinations to Determine Eligibility on Degree of Blindness.)

(W&IC 3075, 3083, 3083.1, 3460, 3462.1, 3471)

These Regulations are designated to become effective JUL 1 1956

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CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

The following Department Bulletins are to be repealed effective July 1, 1956:

- 512 (OAS) Increase in Statutory Maximum OAS Grant from \$80 to \$85, 10/1/55
- 517 (OAS) Eligibility to OAS of Patients in Public Medical Institutions
- 517A(OAS) Eligibility to OAS of Patients in Public Medical Institutions
- 519 (Fis.) AB 1408 Repayments
- 520 Rev. (Fiscal) Claiming for OAS and ANB Patients in Public Medical Institutions

The following Adoption Bulletin is to become repealed effective July 1, 1956:

- 2 Certificate from Department of Mental Hygiene for Use in Freeing a Child for Adoption - Form Adop M50

DO NOT WRITE IN THIS SPACE

These Regulations are designated to become effective ^{repealed} JUL 1 '56

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

W&IC 103.1

R E S O L U T I O N

WHEREAS a joint committee of counties and departmental staff has given consideration to means of reducing the number and amount of minor under- and overpayments, the frequency of grant changes and the number of supplemental payments; and

WHEREAS it appears to this Board that more realistic planning by county workers with recipients of aid may be desirable to reduce the administrative effort now going into repeated month-by-month determinations of precise amounts of need and income as well as into the frequent minor corrections, either through grant adjustment or repayment, now required to be made; and

WHEREAS it is the desire of this Board that alternative methods be more fully explored by actual test in counties selected by the State Director: Therefore be it

RESOLVED, That the State Director be, and he is hereby empowered to select, with county concurrence, counties to use the following general rules instead of the current rules, relating to the process of determining the amount of income and need of applicants for or recipients of Old Age Security, Aid to Needy Blind, and Aid to Needy Children in family units:

- A. The county shall explore with the recipient the various amounts and kinds of need and income which he has or expects to have. The period over which these various individual amounts may be reasonably stable and predictable shall be determined and a money determination of each of them shall be made.
- B. The amounts of money for need and income thus fixed become the amounts of need and income to be considered in determining the amount of the grant for each appropriate month.
- C. Where an amount of need or income has been determined by reasonable estimate, the amount so determined shall not be subject to adjustment or correction on an after-the-fact basis with respect to aid already paid except as follows:
1. When the predicted need or income factor changes substantially in a manner not anticipated
- and
- a. Such change is an increase in need or a decrease in income and is reported promptly;
- or
- b. Such change is a decrease in need or an increase in income.

These Regulations are designated to become effective JUL 1 '56

CONTINUATION SHEET
FOR FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

2. When the information on which the estimate was based was incorrect, or became incorrect, as the result of purposeful withholding or misrepresentation of fact by the recipient and the recipient has by this means obtained funds to which he was not entitled.

D. When the circumstances change substantially from those predicted in the plan the county shall promptly make a new plan for the continuing grant, taking into consideration the changed circumstances; and be it further

RESOLVED, That counties operating under the foregoing rule shall implement said rule by a county plan of operation outlining the discretion to be exercised, such plan to be subject to the approval of the State Director; and be it further

RESOLVED, That appeals arising from this experimental project will be decided by the Board, pursuant to the above principles, on the basis of what the Board determines to be reasonable according to the merits of the case.

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These Regulations are designated to become effective JUL 1 '56

FILING ADMINISTRATIVE REGULATIONS WITH THE SECRETARY OF STATE

(Pursuant to Government Code Section 11380.1)

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JUN 29 1956

Division of Administrative Procedure

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(GOV. CODE 11380.1)

JUN 29 1956

Division of Administrative Procedure

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Copy below is hereby certified to be a true and correct copy of regulations adopted, or amended, or an order of repeal by:

State Department of Social Welfare

(Agency)

Dated: June 27, 1956

By: *George F. Wyman*

Director

(Title)

FILEDin the Office of the Secretary of State
of the State of California

JUN 29 1956

At 12:20 o'clock P.M.

FRANK M. JORDAN, Secretary of State

By: *Frank M. Jordan*

Assistant Secretary of State

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A-014.70 COUNTY RESPONSIBILITY FOR INFORMING APPLICANTS AND RECIPIENTS

A-014.70

Immediately following the county's action granting aid, changing the amount of the grant, or denying or discontinuing aid, the applicant or recipient shall be notified in writing of action taken. This notification shall be in simple, understandable language individualized on the basis of the circumstances in the particular case and shall include:

1. The date action was taken, the nature of the action, and the effective date if aid is granted, changed or discontinued;
2. A suggestion that any questions regarding the county's action or amount of grant be discussed with the county;
3. Notification of the right to a hearing before the board of supervisors;
4. Notification that complaints may be made in person or by writing to the State Department of Social Welfare, and the addresses of the area offices;
5. Notification of the right to appeal to the State Social Welfare Board;
6. If aid is granted or the continuing grant is changed, a statement of the total grant, the reason for the change, the total need and amount allowed for each item of need, the source and amount of each item of income deducted.
7. If an additional payment is made for the current or a past month, in accordance with Sec. A-227.61 or A-227.63, a statement in explanation of the amount of such payment.

(See Section _____, Form Ag 239)

Form DPA 8, Notice to Applicant Who Withdraws Application, shall be mailed or given to the applicant who withdraws an application, unless the county elects to deny the application.

These Regulations are designated to become effective AUG 1 '56

CONTINUATION SHEET
**FILING ADMINISTRATIVE REGULATIONS
 WITH THE SECRETARY OF STATE**
 (Pursuant to Government Code Section 11380.1)

A-225

AID PAYMENTS

Regulations

A-225 VENDOR PAYMENTS TO PUBLIC MEDICAL INSTITUTIONS

A-225

The full amount of the grant is paid directly to a recipient who is a patient in a public medical institution for the first two calendar months of hospitalization (i.e., no part of the grant is paid to the institution), if he enters the institution while he is a recipient. Hospitalization is considered continuous if a recipient is readmitted for the same ailment within 10 days of discharge.

If it appears that a patient will remain in a public medical institution, part or all of the grant is retained for payment to the institution after the end of the month in the following situations:

1. The patient entered the hospital as a recipient (i.e., the beginning date of aid precedes date of admission) and has remained therein for two months, or
2. Aid is granted or restored to a patient in the hospital.

None of the grant is to be paid to the institution if the recipient is not in the public medical institution at the end of the month. The grant or any portion thereof which has been retained for payment to the institution is paid to the recipient upon his leaving the institution or upon his transfer to a unit of the institution where he becomes an ineligible patient, e.g., custodial, mental disease or tuberculosis.

When all or part of the recipient's grant is to be paid to the institution, the distribution is authorized as follows:

1. If the recipient has no income, a direct payment to the recipient of \$13.50, and a vendor payment of \$71.50 to the institution,
2. If the recipient has income of less than \$13.50, a direct payment to him of the difference between his income and \$13.50 and the balance to the vendor,
3. If he has income of \$13.50 or more, his entire grant to the vendor.

Income received by the public medical institution on behalf of the recipient but not available to the recipient for the reason that it was owed to the public medical institution rather than to the recipient is to be disregarded in making distribution of the grant.

(See Chapter 14 and Appendix Fiscal Manual Sections, Sec. F-310, Rules Governing Aid Payments and Sec. A-205.11, Special Need for Care in a Public Medical Institution and Sec. _____ Inter-County Transfers.)

CALIFORNIA-SDSW-MANUAL-OAS

REVISION NO. 38

Effective August 1, 1956

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

Old Age Security PERMANENT SAMPLE PROCEDURE A-1605

A-1600 PURPOSE, OLD AGE SECURITY PERMANENT SAMPLE A-1600

The Old Age Security Permanent Sample is designed to collect socio-economic data on a representative group of OAS cases. Information collected on the OAS Permanent Sample cases will be used:

1. To prepare estimates on the cost and effect of proposed legislation.
2. To predict and evaluate the results of proposed departmental rulings, changes in procedures, etc.
3. To estimate the effects of changes in economic conditions, etc.
4. To provide basic socio-economic data on OAS for welfare administrators and other public officials, and for public information.
5. To provide information required for special and routine reports to the FSSA.

While the information requested will furnish answers to the questions most frequently met, it is anticipated that additional questions will arise from time to time, e.g., during Legislative Sessions, which will require special studies. The SDSW will make every attempt to minimize and routinize the work of the county welfare departments in providing additional data.

(W&IC 115, 116, 2140)

A-1605 NATURE OF THE OLD AGE SECURITY PERMANENT SAMPLE A-1605

The OAS Permanent Sample consists of two parts:

1. Intake Sample - The intake sample (3%) will provide socio-economic data on new applications (including transfers from another county), re-applications, and restorations.

Reporting on the intake sample will be on a continuing basis in accord with Manual Secs. A-1610, A-1615 and A-1620.

2. Caseload Sample - Studies of sample cases selected from the active caseload will be made periodically, but not oftener than annually. The size of sample and the timing, content, and method of study will be determined, with county participation, in accordance with current program needs.

(W&IC 115, 116, 2140)

CALIFORNIA-SDSW-MANUAL-OAS REVISION 41 Effective August 1, 1956

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

A-1610 SUBMITTAL OF OLD AGE SECURITY PERMANENT SAMPLE INTAKE SCHEDULE
FORM AG 251

A-1610

Send one copy of the schedule on specified intake cases to the Bureau of Research and Statistics, SDSW, 722 Capitol Avenue, Sacramento 14, by the 15th of the month following the action granting application, reapplication, or restoration. All schedules for a given month shall be accumulated and sent at one time, accompanied by a transmittal list.

Submit Form Ag 251 on each OAS case (excluding vendor cases) with a state number ending in 22, 44, or 66, upon:

1. Approval of new application for OAS. (Include application of a recipient who has never received OAS because a previous application was denied or withdrawn.)
2. Approval of a reapplication for OAS, if aid has been discontinued for one year or more.
3. Approval of restoration of OAS if aid has been discontinued for less than one year. (Exception: A restoration following discontinuance to adjust for overpayment does not require submission of a new Form Ag 251.)
4. Approval of transfer from another county.

(W&IC 115, 116, 2140)

These Regulations are designated to become effective AUG 1 '56

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WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

Old Age Security

PERMANENT SAMPLE PROCEDURE

A-1620

A- 1620 SPECIFIC INSTRUCTIONS FOR OLD AGE SECURITY PERMANENT SAMPLE
 INTAKE SCHEDULE, FORM AG 251

A-1620

County - Enter the name of the county.

Name - Enter the name of the recipient.

State Number - Enter the state number.

County Number - Enter the county number.

Date of Approval - Enter the date on which the most recent application, re-application, or request for restoration was granted by action of the board of supervisors (or agent).

Item 1. Reason Schedule Prepared - Check the box which shows the reason this schedule was prepared.

Item 2. Sex - Check the appropriate designation.

Item 3. Total Years in California - Enter the total number of years the recipient has lived in California as of the date of this schedule.

Item 4. Year of Birth - Enter the year in which the recipient was born.

Item 5. Marital Status - In addition to marital status of the recipient, this item identifies married couples who are living together and are both receiving OAS (Code 6). In such cases, the spouse's state number shall be reported.

Check "single" if the recipient has never been married.

Check "divorced" if an interlocutory divorce decree is in effect as well as for final divorce and for annulment.

Check "separated" if the recipient is married, but not living with the spouse. If the separation appears to be temporary due to illness, employment, etc., check Code "5" or "6" under "Married, Living with Spouse."

Item 6. Race - Check the one appropriate box. For all persons of Mexican descent (including Mexican-Indian), check "Mexican." "Indian" refers to American-Indian.

(Continued)

CALIFORNIA-SDSW-MANUAL-OAS

REVISION 43

Effective August 1, 1956

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CONTINUATION SHEET
**FILING ADMINISTRATIVE REGULATIONS
 WITH THE SECRETARY OF STATE**
 (Pursuant to Government Code Section 11380.1)

A-1620

PERMANENT SAMPLE PROCEDURE

Old Age Security

A-1620 (Continued)

A-1620

Item 7. Living Arrangements - These entries should reflect the usual living arrangements of the recipient. Hence temporary living arrangements of the recipient or temporary absence of the spouse due to illness, employment, etc., should be disregarded.

For Codes 1 - 3 check all applicable items (e.g., if recipient lives with spouse and adult children check both Codes 1 and 2).

Code 4 - Check this code if recipient lives alone in a house, apartment, flat, hotel, rooming house, etc., preparing his own meals or eating elsewhere.

Code X - Check this code if recipient lives in a licensed boarding home or rest home, boarding house, institution or elsewhere.

Item 8. Type of Dwelling - Check the one box that most nearly describes the recipient's usual place of abode.

Item 9. Personal Property - If the recipient is married and living with a spouse who is also receiving OAS (as reported in Item 5), enter the net value of the combined holdings of the couple. In all other cases report only the recipient's separate holdings and his share of any community property.

Enter the value of the items listed, i.e., the amounts used in determining eligibility. (See Secs. A-730 and A-735)

No Personal Property - If there is no personal property, check "no personal property."

Cash - Enter the value of cash on hand, in the bank, in postal savings accounts, etc.

Market Value of Securities - Enter the current market value of securities (stocks, mortgages, notes, etc.)

Life Insurance - Enter the net cash surrender value of all life insurance policies.

Burial Insurance or Trust; Interment Plot - Enter the value of burial insurance, burial trust or similar funds, and interment plots.

Motor Vehicle(s) - Enter the value of automobiles, trucks, motorcycles, etc. Exclude the value of motorized farm equipment and house trailers used as dwellings.

Other - If an item of personal property fits none of the other listed categories, specify its type and enter its value in "Other."

Total Net Value of Personal Property - Enter the sum of the entries in Item 9.

Item 10. Real Property - Report on all real property of recipient and spouse. Include the spouse's separate property unless the couple is not living together.

(Continued)

CALIFORNIA-SDSW-MANUAL-OAS

REVISION 44

Effective August 1, 1956

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I FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

Old Age Security

PERMANENT SAMPLE PROCEDURE

A-1620

A-1620 (Continued)

A-1620

Item 10A. Nature - Note that for purposes of Old Age Security, any place of abode is considered real property. A house trailer or houseboat should, therefore, be checked "recipient's or spouse's home," if it is used by the recipient as a dwelling.

Item 10B. Value - Total Assessed Value - Enter the total county assessed value of all real property reported under Item 10A.

Total Encumbrances - Enter the total amount of encumbrances against the real property reported under Item 10A.

Net Assessed Value - Enter the difference between the total assessed value and total encumbrances. If the encumbrances are greater, enter "0."

Item 11. Sources and Amounts of Income Other than Grant - Check "no income" if the recipient has no income. Disregard casual and inconsequential income. (See Sec. A-211)

If the recipient has regularly recurring lump sum income received at intervals greater than one month, prorate in accordance with Sec. A-212.7.

Generally, the sources listed are self-explanatory. However, the following points should be made:

1. If OASI is paid in the recipient's name but is shared with the spouse, enter under "Old Age and Survivor's Insurance" only the portion used in computing the recipient's grant. Enter the full amount of the recipient's monthly OASI payment in Item 13.

If OASI is allocated to the recipient from the spouse, report the amount allocated as a "contribution from spouse."

2. If the recipient receives net income for rental of real property (in which he has an ownership interest), show this as "net income from real property." On the other hand, net income from subrentals and boarders should be reported as earnings.
3. Contributions from adult children are to be reported according to whether they are made in cash or in "kind," e.g., free rent.

(Section Continued on Next Page)

CONTINUATION SHEET
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WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

A-1620

PERMANENT SAMPLE PROCEDURE

Old Age Security

A-1620 (Continued)

A-1620

4. If income is received from any source other than those listed, report under "Other" and specify the source. Report here General Relief given on a continuing basis as a supplement to the OAS grant.

In the space provided, enter the total amount of all income reported.

Item 12. Financial Summary

Item 12A. Type of Grant - Check "flat grant" if recipient has no income, or if all of his income is deducted from \$80.

Check "special need" if recipient has income and has special needs considered in determining amount of grant.

Item 12B. Total Need - Enter the total need for special need cases only.

Item 12C. Total Monthly Income - Enter the recipient's total monthly income.

Item 12D. OAS Grant (Full Month) - Enter the amount of the first full month's grant.

Item 12E. Unmet Need - If the total need exceeds the sum of the recipient's income and his grant, enter the difference. If there is no unmet need, enter "none." For flat grant cases enter a dash (--).

Item 13. Old Age and Survivors Insurance - (To be completed only for cases in which a portion of OASI is allocated to the spouse.) Enter the full amount of OASI received in the recipient's name.

Item 14. Principal Sources of Support During 12 Months Preceding Application - This section is reserved for new cases and reapplications (those checked "new application" or "reapplication" in Item 1) with state numbers ending in 22, 44, 66, or 88. (See Sec. A-1605)

Check the box opposite each of the listed sources from which the recipient received important support during 12 months preceding application. Specify sources not listed in the space provided.

It is important that each schedule be dated and signed by the person completing it.

(W&IC 115, 116, 2140)

(Continued)

CALIFORNIA-SDSW-MANUAL-OAS

REVISION 45

Effective August 1, 1956

DO NOT WRITE IN THIS SPACE

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CALIFORNIA-SDSI-ANNUAL-OAS

Issued June 16, 1952
Effective August 1, 1952

OLD AGE SECURITY PERMANENT SAMPLE SCHEDULE

1. REASON SCHEDULE
PREPARED (check one)

- Annual reinvestigation. ☐ 1
New application. ☐ 2
Reapplication. ☐ 3
Restoration. ☐ 4
Transfer from another county. ☐ 5

2. SEX (check)

- Male. ☐ 6
Female. ☐ 7

3. TOTAL YEARS IN
CALIFORNIA

4. YEAR OF BIRTH

5. MARITAL STATUS
(check one)

- Single. ☐ 1
Widowed. ☐ 2
Divorced. ☐ 3
Separated. ☐ 4
Married, living with spouse--
spouse not receiving
OAS. ☐ 5
spouse receiving
OAS. ☐ 6
(enter state case
number of spouse)

6. RACE (check one)

- White. ☐ 1
Negro. ☐ 2
Mexican. ☐ 3
Indian. ☐ 4
Other. ☐ X

7. LIVING ARRANGEMENTS
(check all applicable items)

- With spouse. ☐ 1
With adult children. ☐ 2
With friends or other relatives. ☐ 3
Alone. ☐ 4
Other arrangement. ☐ X

8. TYPE OF DWELLING
(check one)

- House. ☐ 1
Apartment or flat. ☐ 2
Hotel. ☐ 3
Rooming house--
with house-keeping facilities. ☐ 4
without house-keeping facilities. ☐ 5
Licensed boarding home or rest home. ☐ 6
Boarding house. ☐ 7
Institution. ☐ 8
Other. ☐ X

9. PERSONAL PROPERTY (Enter Net
Values)

- No personal property. ☐ 0
Cash (on hand, in bank, postal savings, etc.) \$ 1
Market value of securities (stocks, mortgages, notes, etc.) \$ 2
Life insurance (Net cash surrender value, all policies) \$ 3
Burial insurance or trust; interment plot. \$ 4
Motor vehicle(s) \$ 5
Other (specify) \$ X
Total net value of personal property \$

10. REAL PROPERTY

A. NATURE (check all applicable items)

- No real property. ☐ 0
Recipient's or spouse's home. ☐ 1
Other improved property. ☐ 2
Unimproved property. ☐ 3

B. VALUE

- Total assessed value. \$
Total encumbrances. \$
Net assessed value. \$

COUNTY

STATE NO.

NAME

COUNTY NO.

Last

First

DATE OF APPROVAL OR COMPLETION OF REINVESTIGATION

11. SOURCES AND AMOUNTS OF INCOME OTHER THAN GRANT

- No income. ☐ 0
Use and occupancy of home. \$ 1
Old Age and Survivors Insurance. \$ 2
Contributions from spouse. \$ 3
Contributions of adult child
Cash. \$ 4
Kind. \$ 5
Pension or annuity. \$ 6
Net income from real property. \$ 7
Recipient's net earnings. \$ 8
Friend or non-responsible relative. \$ 9
Other (specify) \$ X
Total monthly income. \$

12. FINANCIAL SUMMARY

A. TYPE OF GRANT (check one)

- Flat grant. ☐ 1
Special need. ☐ 2

B. TOTAL NEED (omit for flat grant cases) \$ C. TOTAL MONTHLY INCOME (see item 11) \$ D. OAS GRANT (full month) \$ E. UNMET NEED (portion of total need not covered by grant and income) \$ 13. OLD AGE AND SURVIVORS
INSURANCE (To be completed only for cases in which a portion of OASI is allocated to spouse. Enter the full amount of OASI paid in recipient's name) \$

(For New Cases and Reapplications only)

14. PRINCIPAL SOURCES OF
SUPPORT DURING 12 MOS
PRECEDING APPLICATION
(Check all applicable items)

- Earnings. ☐ 1
Savings. ☐ 2
Adult children. ☐ 3
Spouse. ☐ 4
Other relatives or friends. ☐ 5
Old Age & Survivors Insurance. ☐ 6
General Relief. ☐ 7
Income from property (rentals, etc.). ☐ 8
Military allowances. ☐ 9
Other (specify below) ☐ X

Signature of Person Completing Schedule

Date Schedule Completed

NOTE: Entries on this form should most nearly reflect the situation in the judgment of the public assistance worker and will not necessarily be identical with verified data contained in the case record, e.g., general evidence may indicate a recipient has lived in California for 10 yrs., whereas only five years are verified.

Form AG 251 (Revised July 1952)

State of California
Department of Social WelfareCONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

Old Age Security

PERMANENT SAMPLE PROCEDURE

A-1620 (Continued)

A-1620

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

B-170 The Application Form
(Subsection C only)

B-170

C. Signature

The applicant is to make his usual signature. A woman is to use her own given name. An applicant who usually prints his name may sign it in this manner. A signature in a foreign language is acceptable.

If the applicant is unable to sign his name, a mark (or thumb print) may be used. In this case, two persons are required as witnesses. The form for the signature is as follows:

	his	
John	X	Jones
	mark	

Signature or Mark of Applicant

Witness to Mark

Witness to Mark

If the applicant is handicapped to the extent that he is unable to sign his name or to make his mark, it is acceptable for a witness to touch the pen to the body of the applicant prior to making the mark for him. Thus, by making the ritual a physical act rather than actually having the applicant himself make the mark, the objective of maintaining the comfort and the dignity of the individual can be approached. In this instance, the mark itself is made by one of the two witnesses.

A rubber stamp signature imprint is an acceptable signature if there is assurance that its use is authorized by the applicant or if the fixing of such stamp imprint is witnessed by two persons.

The above instructions regarding form of signature, etc., apply to signatures on all forms which may be required. (See Sec. B-155 on Signature in Guardianships)

These Regulations are designated to become effective.....AUG 1 1956.....

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CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

AID PAYMENTS

Aid to the Blind

B-664 INSTRUCTIONS FOR CODING REASONS FOR DISCONTINUANCE OF BL 278

B-664

The code for the reason for discontinuance of Aid to Needy Blind or Aid to Partially Self-supporting Blind residents shall be entered in the space designated for that purpose in Item 16 of Form BL 278, Authorization to Pay, Deny, Suspend, or Discontinue Aid to the Blind. If several reasons apply, enter the code for the one which occurred most recently. If several reasons occur simultaneously, enter the code for the applicable reason appearing first on the list. One copy of the authorization document on each case is forwarded to the SDSU. (See Sec. B-663.)

Code reasons for discontinuance as follows:

Code 99. DEATH.

Code 89. TRANSFERRED TO ANOTHER COUNTY: Aid is discontinued because the recipient has moved to another county and aid is being furnished by the other county.

Code 69. ADJUSTMENT FOR OVERPAYMENT: Aid of an eligible recipient is discontinued for the first and/or second month following overpayment to adjust for same.

INCOME REASONS

Codes 01 and 02. Earnings of recipient: Include earnings from new employment and increased earnings. Also include earnings from self-employment. Include income derived from roomers and/or boarders in the household, if the recipient is responsible for management of the household. If the spouse is responsible for management of the household, use Code "03."

Code 01. County assisted in job placement: County made placement referral to an agency or employer or provided employment counselling.

Do not use this code for discontinuances in which the county's participation in finding employment was only casual or incidental. In such cases use Code "02."

Code 02. Recipient found own employment.

(Continued)

CONTINUATION SHEET
**FILING ADMINISTRATIVE REGULATION
 WITH THE SECRETARY OF STATE**
 (Pursuant to Government Code Section 11380.1)

Aid to the Blind

AID PAYMENTS -

B-664 (Continued)

B-664

- Code 03. Earnings or other resources of spouse: Earnings (including earnings from self-employment) or separate income of the recipient's husband or wife. Examples are rental of the spouse's separate property or income derived from roomers and/or boarders in the household when the spouse is responsible for management of the household. Include marriage or remarriage and assumption of support by spouse.
- Code 04. Contributions from parents or adult children: Support in cash or in kind.
- Code 05. Monthly income from real property: Such as the net rental of property owned by the recipient or his share of net income from rental of community property.
- NOTE: Do not use this code for "recurring lump-sum income" (See Sec. B-574). Such cases should be reported under Code "06."
- Code 06. Recurring lump-sum income: Income received at intervals of two months or more, in the same or in varying amounts, as defined in Sec. B-574.
- Code 07. Old Age and Survivors' Insurance: OASI benefits paid in the recipient's name. Allocations from a spouse's benefits should be reported under Code "03."
- Code 08. Railroad retirement benefit: Benefits paid in the recipient's name. Allocations from a spouse's benefits should be reported under Code "03."
- Code 09. Military pension or benefit: Veterans benefits, serviceman's dependent benefits or any other benefits resulting from service in the armed forces by the recipient or a relative.
- Code 10. Other pension or annuity: A monthly benefit, pension or annuity from any public or private source other than those listed for Codes "07" through "09" above. Use Code "06" if this income recurs at intervals of two months or more.
- Code 11. Other income: Income from sources other than those listed above, e.g., contributions from friends, unemployment or disability insurance, income from personal property, etc.

PROPERTY REASONS

- Code 20. Increased real property holdings: Additions to the real property of recipient and/or spouse have caused the net assessed value of total real property to exceed that permitted under the Aid to the Blind law.
- Code 21. Increased assessment of real property: The assessed value of the recipient's and/or spouse's real property has been increased so that the net assessed value exceeds the legal maximum, but there has been no increase in holdings.

(Section Continued on Next Page)

CALIFORNIA-SDSW-MANUAL-AB

Issued April 23, 1954
 Effective June 1, 1954

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CONTINUATION SHEET
**FILING ADMINISTRATIVE REGULATION
 WITH THE SECRETARY OF STATE**
 (Pursuant to Government Code Section 11380.1)

AID PAYMENTS

Aid to the Blind

B-664 (Continued)

B-664

Code 22. Refuses to comply with real property utilization requirements: The recipient refused to utilize his real property holdings or to offer his property for sale if such sale is necessary as required by Sec. B-436.

Code 23. Increased personal property holdings: The net value of the recipient's personal property or of the combined recipient's and spouse's personal property has increased beyond the legal maximum.

PUBLIC INSTITUTION REASONS

Code 29. Admitted to public TB or mental hospital or in other public medical institution because diagnosed as TB or psychotic: Recipient admitted to a public institution maintained for the exclusive purpose of treating persons suffering from tuberculosis or mental disease or recipient admitted to any public medical institution as a result of a diagnosis of tuberculosis or psychosis.

Code 31. Patient in county infirmary (custodial care): I.e., for shelter and maintenance only. Include patient in county hospital if for custodial care only.

Code 32. Inmate of other public institution: E.g., county jail, state prison, federal institution (including medical), etc.

OTHER REASONS

Code 33. Accepted for the other Aid to the Blind program.

Code 34. Loss of state residence.

Code 35. Whereabouts unknown: All efforts to locate have failed.

Code 36. Discontinuance requested by recipient; no reason given for request.

Codes 37 and 38. Present vision exceeds standard for blindness.

Code 37. Accepted for OAS.

Code 38. NOT accepted for OAS.

Code 40. Offset discontinuance for overpayment.

Code 41 and 42. Change in state law or policy: These codes are to be used only for reporting specific changes in state law or policy. Do not use unless special instructions have been issued by the SDSW.

Code 50. Other: Reasons other than those listed above. Every effort should be made to classify a reason for discontinuance under one of the specific codes. Use this code only when no other reason is applicable.

(W&IC 3075, 3460)

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

Aid to Needy Children DETERMINATION OF ELIGIBILITY - INCOME

C-356

C-356 (Continued)

C-356

D. RESPONSIBILITY OF STEPPFATHERS

1. The Requirement

Where ANC is requested for a needy child living with his mother and stepfather, the stepfather is bound to support his wife's children in accordance with his ability but support cannot be enforced beyond his legal liability. His liability shall not exceed his wife's community property interest in his income, i.e., one-half of his total gross earnings and one-half of other net community income. The measurement of his ability to support is set forth in Sec. C-364, B.

2. The Purpose

The purposes of this provision are to secure continuous and reasonable support from the stepfather without impairing the welfare of the children and without disrupting the unity of the family. To effect these purposes, the needs of the stepfather and his dependents living in the home (i.e., his wife, his children, and other dependents) are to be computed at a standard somewhat higher than the ANC standard to determine how much income is left over to be applied to the needs of his stepchildren. To achieve a higher standard and to give recognition to varied circumstances in stepfather families, ten per cent of the stepfather's gross earnings plus actual contributions to his dependents outside the home are deducted in determining his net income. This ten per cent deduction is also intended to provide incentive to the stepfather to increase his earnings.

It is recognized that policy provisions relating to stepfathers may not answer precisely every question arising out of the great variety of family situations in which there is a stepfather. The county shall resolve such questions within the framework of the purposes and policies set forth.

(Section Continued on Next Page)

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CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

C-356

DETERMINATION OF ELIGIBILITY - INCOME

Aid to Needy Children

C-356 (Continued)

C-356

3. Planning with the Stepfather

The stepfather should be encouraged to participate with the mother, in the county's determination of eligibility and planning with the family. He shall be interviewed whenever possible prior to the determination of the amount of the aid payment and the granting of aid. He is required to report the amount and source of all his income and his expenses.

The county shall discuss with the stepfather his plan as to what he can and will do for the children and his plans for their future support. The purpose of interviewing and planning with the stepfather is to encourage him to contribute the maximum amount possible and to ascertain whether the family can be completely self-supporting on the basis of the stepfather's willingness to contribute to the support of his stepchildren. Also, the purpose of this interview with the stepfather is to inform him of his responsibilities under the law and the bases for the amount of his required contributions.

When aid is to be granted the stepfather shall be informed of the needs allowed for the ANC children, and of the family's responsibility for keeping the county informed of changes in circumstances.

4. Relationship to Other Requirements

Where a needy child lives apart from his mother and stepfather, the stepfather is not bound to support the child.

A natural father is not relieved of any legal obligation to support his children by the liability for their support imposed upon their stepfather.

With reference to a stepmother in the home, see Sec. C-225.

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CALIFORNIA-SDSW-MANUAL-AND

REVISION 458

Effective August 1, 1956

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

C-364 DETERMINATION OF INCOME FROM PERSONS LIVING IN THE HOUSEHOLD

C-364

Subsection E Only

E. PERSONS NOT MEMBERS OF THE FAMILY BUDGET UNIT

If an unemancipated minor, who does not qualify for inclusion in the family budget unit, is living in the household, his net earnings shall be determined in accordance with Item C, 1, of this section. His total needs (including his pro-rated share of household expense) shall be deducted from the net earnings. Any and all remaining earnings shall be considered as net income to the family budget unit.

If nonneedy emancipated minors, employed relatives, or other persons are living in the household, they shall pay the usual community rate for the type of board and room they receive.

Where a man living in the household is assuming the role of spouse to the mother of eligible children, the income for the eligible children shall be determined by the method prescribed for stepfather cases as outlined in Subsection B of this section.

Net income to the family budget unit from a related person in the household who is not a member of the family budget unit, including the nonneedy emancipated minor and the adult child, shall be determined by deducting from the actual payment:

(Section Continued on Next Page)

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CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

Aid to Needy Children DETERMINATION OF ELIGIBILITY - INCOME C-364

C-364 (Continued) C-364

- 1. Food, in accordance with the ANC Cost Schedule, if he eats at home.
- 2. His prorated share of utilities and rent (or housing expenses) and special needs common to the household.
- 3. A flat amount of \$1.50 for household operation.

If a non-related person or related OAS recipient paying board and room is living in the household, the net income to the family budget unit shall be determined by deducting from the actual payment:

- 1. The actual cost of food, if boarding. If the boarder is a recipient of OAS, ANB, or APSB, the OAS-ANB basic food value of \$28.50 per month is considered the actual cost of food.
- 2. The person's prorated share of rent (or housing expenses), utilities, and special needs common to the household, plus any amount by which the cost of a utility exceeds the allowance given in the Cost Schedule.
- 3. Laundry, cleaning, and replacement of linen expenses incident to the rental of a room.

The total amount of ANB or APSB granted (including exempt income) is intended to help meet the individual needs of the recipient and shall not be construed as income to any other person. Although such a recipient may pay room and board, his assistance grant and income shall not be pooled with the ANC family.

(Section Continued on Next Page)

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CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

C-364 DETERMINATION OF ELIGIBILITY - INCOME Aid to Needy Children

C-364 (Continued) C-364

However, if the spouse of an ANB or APSB recipient is included in the ANC family budget unit, one-half the income from community property and any voluntary allocation made from the recipient's non-exempt current earnings shall be considered as income to the spouse.

If a recipient of OAS is living with the ANC family and his entire grant and income is pooled with the family, the net income to the family shall be determined by deducting from the total amount pooled with the family the need items for such an individual in accordance with the OAS basic needs values for food, transportation, clothing, housing maintenance and replacement, incidentals and personal needs, special needs, if any, and the prorated share of utilities, rent (or housing expense), and special needs common to the household. However, each OAS recipient living with an ANC family shall be informed that he is not required to pool or continue to pool his OAS grant or other income with the ANC family.

The OAS basic needs are valued as follows:

Food	\$28.50
Housing.	15.00
Utilities.	6.30
Clothing	7.70
Housing, maintenance, and replacement.	4.50
Transportation	4.50
Incidentals.	13.50
Education and Recreation	<u>5.00</u>
Total	\$85.00

(W&IC 1560)

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CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

F-440 Plan for Collection of Repayments
(Subsection B, 9 only)

F-440

9. Counties may include in their promissory notes a provision that the debtor waives the Statute of Limitations. Unless extended, waived, or rendered inoperative by an action of the debtor, the Statutes of Limitations in California on repayment of aid are generally as follows:

- a. For unsecured debts not arising from fraudulent action on the part of the debtor nor evidenced by a promissory note or a contract in writing, the statute runs two years from the date of the overpayment.
- b. Where the liability is created by statute, the Statute of Limitations runs three years from the date of the overpayment.
- c. Where fraud is established on the part of the debtor, the statute runs three years from the date of the discovery of the fraud.
- d. For debts evidenced by a promissory note or a contract in writing, the statute runs four years from due date of such written instrument.
- e. On judgment liens, the statute runs ten years from the date of entry of judgment or of renewal thereof.

A debt in groups a, b, or c can be extended by securing an Agreement to Reimburse Note (see d). Such debt can be further extended ten years by securing a judgment. All debts (excepting probate actions) can generally be renewed repeatedly by appropriate legal means if action is taken prior to the running of the statute. (Reference Code of Civil Procedures, Sections 336 to 345, inclusive.)

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CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

Fiscal

AID CLAIMS

F-790

F-790 PACKAGING AND TRANSMITTAL OF AID CLAIMS

F-790

All OAS, ANB, APSB, ANC, and ANC-BHI claims filed with the state for aid payments shall be forwarded by the counties so as to be received by central office of the SDSW not later than the 8th working day of the month immediately following the month of claim. OAS and ANB VPMI claims shall be forwarded so as to be received by the central office of the SDSW not later than the 15th day of the month following the month of the claim. The ability of the state to prepare quarterly statements of expenditure for the federal government within the required deadline, which is necessary to assure timely monthly advances of federal monies to the counties, depends upon prompt transmittal of county claims.

All claims shall be addressed to SDSW, 722 Capitol Avenue, Sacramento 14, Attention: Fiscal Services. Statistical reports and material for other bureaus or divisions of the central office shall not be packaged with claims. Insofar as is possible, each claim shall be transmitted completely at one time in one package. Parts of claims may be submitted separately if:

1. Because of bulk, payrolls for aid claims are sent by express rather than by mail. If payrolls are sent by express, the Certification, Forms Ag, Bl, CA, 800, and AB 800-V, Claim Summary Sheets, Forms AB, CA 802, and AB, CA 802 A, and AB 802-V, and Reconciliation Statement, Form ABC 820, or 820A, shall be transmitted by first class mail. A statement shall be included with the mailed documents identifying the material shipped by express and the shipping date.
2. It is not possible to obtain signatures promptly on the certification forms. In this event, an unsigned completed certification (one copy) shall accompany the claim with a note or letter explaining that the signed copies (in triplicate) are to be mailed later (specify date).
3. It is not possible to reconcile the claim in time to enable transmittal by the deadline date. The reconciliation statement may be forwarded later rather than holding up the entire claim. In that event, a note or letter shall be mailed with the claim documents to indicate that the reconciliation statement will be forwarded separately (specify date).

(Continued)

CALIFORNIA--SDSW-MANUAL-FISCAL

REVISION 237

Effective August 1, 1956

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CONTINUATION SHEET
R FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

F-790

AID CLAIMS

Fiscal

F-790 (Continued)

F-790

One complete set of each separate claim (OAS, ANB, OAS-VPMI, ANB-VPMI, APSB, ANC, ANC-BHI) prior to transmittal to the SDSW shall be segregated and, depending upon bulk, shall be fastened together in the following order:

1. Certification, Forms Ag, Bl, CA 800, and AB 800-V
2. Claim Summary Sheets, Forms AB, CA 802, AB, CA 802 A, and AB 802-V
3. Reconciliation Statement, Form ABC 820 or 820 A
4. Report of Repayment, Form ABC 808
5. Main Payroll
6. Supplemental payrolls for the current month
7. Supplemental payrolls for prior months
8. Contra rolls for current cancelations
9. Contra rolls for prior cancelations
10. Contra rolls for repayment of aid
11. Schedule of Repayments, Form ABC 803
12. Schedule of Adjustments, Forms AB, CA 816

The second and third sets of the summary documents, Forms Ag, Bl, CA 800; AB 800-V, AB, CA 802, AB, CA 802A, AB 802-V, ABC 820 or ABC 820-A, shall each be fastened together and transmitted with the complete claim.

(W&IC 116, 1559, 1560, 2140, 2189, 3075, 3087.3, 3460, 3482)

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CALIFORNIA-SDSW-MANUAL-FISCAL

REVISION 238

Effective August 1, 1956

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

S-110 SUBMISSION OF MONTHLY STATISTICAL REPORTS ON PUBLIC ASSISTANCE

S-110

All counties shall submit copies of the following reports each month to the Bureau of Research and Statistics, SDSW, 722 Capitol Avenue, Sacramento, by the specified due date.

Due not later than the 12th of the month following the month covered by the report:

One copy each of the Monthly Statistical Reports on OAS, ANB, APSB, ANC and GR (Forms AG 237, BL 237, APSB 237, CA 237-FG, CA 237-BHI and GR 237).

If there is a substantial time lapse between the time when the application and case movement data (Sections A, B, and C) and the expenditure data (Section D) are available, the application and case movement data should be sent in as soon as available, and Part D as soon as possible thereafter. However, the complete report (Sections A through D) is due in Sacramento not later than the 12th of the month.

Due not later than the 18th of the month following the month covered by the report:

Two copies each of the Monthly Statistical Reports on Public Assistance Reinvestigations and Application Disposals, Form DPA-10, and Monthly Statistical Reports on Reasons for Discontinuation, OAS and ANC, Forms AG 253 and CA 253-FG.

Counties should retain file copies of all monthly statistical reports.

(W&IC 115, 116)

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CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

S-120

PUBLIC ASSISTANCE

Statistical

S-120 INTRODUCTION - MONTHLY STATISTICAL REPORTS ON FORMS
AG 237, BL 237, AND APSB 237

S-120

Content of Reports

Data on these reports are limited to individuals who are receiving, or who make applications or requests (including restoration) to receive aid from OAS, ANB or APSB funds.

Each report is divided into four parts as follows:

- A. REQUESTS FOR AID - Include all requests for aid except requests for restoration of aid and requests for intercounty transfers.
- B. APPLICATIONS AND WRITTEN REQUESTS FOR RESTORATION - Separate columns are provided for applications (Column 1) and written requests for restoration (Column 2). Exclude from this part applications for transfer from another county, automatic restorations and restorations after discontinuance of one or two months for overpayment adjustment. Also exclude transfers of active cases between the ANB and APSB programs.
- C. CASES
- D. NET EXPENDITURES

When to Report Actions:

Statistical counts listed below, except automatic restorations, are to be reported according to the month in which the board of supervisors takes the official action, not the month in which the action affects the payroll, unless these months are the same:

- 1. New applications and reapplications granted or denied
- 2. Requests for restoration granted (except automatic restorations) or denied
- 3. Restorations granted after case is discontinued for one or two months to adjust for an overpayment
- 4. Discontinuances.

(Continued)

CALIFORNIA-SDSW-MANUAL-STAT

Revision No. 88

Effective August 1, 1956

CONTINUATION SHEET
**FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE**
(Pursuant to Government Code Section 11380.1)

Statistical

S-120

S-120 (Continued)

S-120

Report automatic restorations when payment of aid is resumed (for definition see Manual of Policies and Procedures - OAS, and AB).

Discontinuances are to be reported when the board of supervisors takes action whether or not aid was paid for the current month and whether the discontinuance was effective at the end of the current month or of a prior month. Exception: If discontinuance action is taken in the current month to be effective at the end of a future month, report such discontinuance in the month in which the last warrant is paid.

Note: Intercounty transfers, transfers between ANB and APSB, automatic restorations and restorations after discontinuance of one or two months to adjust for overpayment are to be reported only in Part C.

Board of Supervisors

The term "board of supervisors" shall be construed to include the duly authorized agent of the board of supervisors.

Definition of "Current Month" and "Last Month"

The calendar month on which the county is reporting statistically will be referred to as the "current month." The month immediately prior to the "current" month will be referred to as "last month."

(W&IC 115, 116)

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PUBLIC ASSISTANCE

Statistical

S-122 PART A - REQUESTS FOR AID, FORMS AG 237
BL 237, APSB 237

S-122

This part includes all requests for OAS, ANB, or APSB, except requests for restoration and requests for transfer from another county, whether made orally (in person or by telephone) or in writing, if it is clear that the request is for the program covered by the report, even though the individual may not know the title of the program. Requests for information only are not to be reported as requests for aid. Count only one request if two or more requests are made during the month by the same individual.

If the request is made and the application signed during the first contact with the individual, or during the same month, it shall be reported in Part A, as a request, as well as in Part B, as an application signed. (Note that Part A excludes requests for restoration of aid and requests for transfer of aid from another county.)

Item 1. Pending from Last Month - Enter the number of requests for aid brought forward from last month. If Item 5 of last month's report was in error, the correct figure shall be shown in Item 1 and an explanation of the correction shall be made in a footnote.

Item 2. Received During Month - Enter the number of requests for aid received during the current month. Exclude requests for restoration and requests for intercounty transfer of aid.

Item 3. Total - Enter the sum of Items 1 and 2.

Item 4. Disposed of During Month - Enter the sum of Items 4a and 4b.

Item 4a. Applications Signed - Enter the number of applications signed (except for transfer from another county) during the current month. This is the same as Item 7, Column 1.

Item 4b. Requests Withdrawn or Canceled (Application not signed) - Enter the number of requests that were withdrawn or canceled during the current month. If no action on the request is taken by the end of the calendar month following that in which the request was received, report the request as canceled.

Item 5. Pending at End of Month - Enter the number of requests for aid which have not been disposed of and which are still awaiting action at the end of the current month.

(W&IC 115, 116)

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Statistical PUBLIC ASSISTANCE S-124

S-124 PART B - APPLICATIONS AND WRITTEN REQUESTS FOR RESTORATION, S-124
FORMS AG 237, BL 237, APSB 237

This section is designed to report the movement of applications and requests for restoration. Separate columns are provided for segregating new applications and reapplications (Column 1) from written requests for restoration (Column 2). Exclude automatic restorations and restorations after discontinuance of one or two months to adjust for overpayment.

An application or written request for restoration erroneously denied in a prior month shall be included in the current month count as an adjustment in Item 6 and as an application or written request for restoration granted under Item 9a. An explanation of the reason for the adjustment in Item 6 shall be shown in a footnote.

Item 6. Pending from Last Month - Enter the number of applications and written requests for restoration previously received which had not been disposed of, i.e., granted, denied, withdrawn, or canceled, by the end of last month. If Item 10 of last month's report was in error, or a revision is necessary for some other reason, the correct figure shall be shown in Item 6 and an explanation of the correction shall be made in a footnote.

Item 7. Received During Month

Column 1. Applications - Enter the number of applications (Forms Ag, Bl 200 or Ag 200B) which were signed during the current month. To avoid duplication, exclude OAS applications (Form Ag 200) subsequently signed by the applicant if Form Ag 200B has already been included in the application count. Exclude applications for transfer of aid from another county. Item 7 must agree with Item 4a.

Column 2. Written Requests for Restoration - Enter the number of written requests for restoration received by the welfare department during the current month. Exclude restorations on which no written request is required, i.e., automatic restorations and restorations after discontinuance of one or two months to adjust for overpayment.

Item 8. Total - Enter the sum of Items 6 and 7.

Item 9. Disposed of During the Month - Enter the total of Items 9a, 9b, and 9c.

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PUBLIC ASSISTANCE

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S-124 (Continued)

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- Item 9a. Granted - Enter the number of applications (both new and reapplications) and requests for restoration granted during the current month regardless of the beginning date of aid. Item 9a, Column 1, must equal the sum of Items 12a and 12b. Item 9a, Column 2, must equal Item 12c.
- Item 9b. Denied - Enter the number of applications and requests for restoration denied during the current month.
- Item 9c. Withdrawn or Canceled - Enter the number of applications and requests for restoration withdrawn by the applicant during the current month or canceled because the individuals have died. Applications and requests for restoration withdrawn by the applicant on which the county takes denial action are to be reported in Item 9b.
- Item 10. Pending at End of Month - Enter the number of pending applications (Column 1) and requests for restoration (Column 2), including those signed in the current month, which had not been disposed of (i.e., granted, denied, withdrawn, or canceled) by the end of the month. This item is equal to Item 8 minus Item 9.

(SIC 115, 116)

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Statistical

PUBLIC ASSISTANCE

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S-126 PART C - CASES, FORMS AG 237, BL 237, APSB 237

S-126

This part is designed for reporting cases that have been granted by action of the board of supervisors and are either continuing cases or cases discontinued by county action during the current month.

- Item 11. Brought Forward from Last Month - Enter the number of active cases brought forward from last month. This entry should agree with Item 15 of last month's report. If Item 15 of last month's report was in error, the correct figure shall be shown in Item 11 and an explanation of the difference shall be made in a footnote. A case erroneously discontinued in a prior month shall be included in the current month count as an adjustment in this item.
- Item 12. Granted During Month - On each report enter the total of the entries in the sub-items; i.e., on Form AG 237 enter the sum of Items 12a through 12e, and on Forms BL and APSB 237 the sum of Items 12a through 12f.
- Item 12a. New Applications - Enter the number of new applications granted during the current month regardless of effective date, i.e., the beginning date of aid. Include reapplications granted for persons whose previous applications were withdrawn or denied. Exclude applications for transfer of aid from another county.
- Item 12b. Reapplications - Enter the number of reapplications granted during the current month, regardless of the effective date. Include only reapplications granted for individuals who previously received this aid and were discontinued 12 months or more ago. Reapplications granted for individuals whose only previous applications were denied or withdrawn are to be reported as "new" applications granted (Item 12a).
- Item 12c. Restorations - Written Request - Enter the number of written requests for restoration granted during the current month, regardless of effective date. (A request for restoration is a request for aid by a former recipient whose grant was discontinued within 12 months prior to the date of the request.) Exclude "automatic" restorations and restorations after discontinuance of one or two months for overpayment adjustment; report such restorations in Item 12d.
- Item 12d. Restorations - Written Request Not Required - Enter the number of restorations granted on which no written request for restoration is required, i.e., "automatic" restorations and restorations after one or two months discontinuance to adjust for overpayment. (For definitions of automatic restoration, see Sec. A-014.20, Manual of Policies and Procedures - OAS and Sec. B-651, Manual of Policies and Procedures - AB.)

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S-126 (Continued)

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- Item 12e. Transfers from Another County - Enter the number of transfers from another county granted during the month.
- Item 12f. (Form BL 237) Transfers from APSB - Enter the number of transfers from the APSB program granted during the month.
- Item 12f. (Form APSB 237) Transfers from ANB - Enter the number of transfers from the ANB program granted during the month.
- Item 13. Total Cases - Enter the sum of Items 11 and 12. This item is also the sum of Items 13a and 13b. This count includes all continuing cases, all cases added during the current month in Item 12, and all cases reported as discontinued in Item 14. It will include all cases that received aid for the current month as well as cases that did not receive aid because the warrants were canceled or were not written.
- Item 13a. (Forms AG, BL 237) Received OAS, ANB - Enter the sum of Items 13a (1), (2), and (3).
- Item 13a. (Form APSB 237) Received APSB - Enter the number of persons who during the current month, received APSB warrants for the current month or whose warrants for the current month were held.
- Item 13a(1) (Forms AG, BL 237) Entire Grant to Recipient - Enter the number of cases who, during the month, received warrants (i.e., "cash") for the entire authorized grant for the current month, or whose warrants for the current month were held. Exclude recipients in public medical institutions in whose behalf part of the grant will be paid to a public medical institution; report these in Item 13a(2). Exception: Include individuals who received part of their grant as a personal allowance while they were in a public medical institution, but who left the institution (or licensed ward or bed) or who died, prior to the end of the month, so that no payment to the institution is made for the month in their behalf.

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Statistical PUBLIC ASSISTANCE S-126

S-126 (Continued) S-126

Item 13a(2) (Forms AG 237, BL 237) Personal Allowance and Payment to P.M.I. - Enter the number of persons who received part of the grant for personal and incidental expenses and on whose behalf part of the grant was also paid after the end of the month to a public medical institution.

Item 13a(3) (Forms AG 237, BL 237) Entire Grant to P.M.I. - Enter the number of cases on whose behalf all of the grant was paid to a public medical institution, i.e., the individual received no payment from OAS, ANB funds for personal and incidental expenses because his income is equal to or more than the allowance for this item.

Item 13b. Did Not Receive OAS, ANB, APSB) - Enter the number of active cases which were not authorized to receive assistance for the current month and the warrants were canceled or not written. Entries in this item, for example, include the following types of cases:

- 1. Restorations (when written request is not required), and transfers from another county granted this month, effective in a future month.
- 2. Include in this item cases granted so late in the current month that warrants authorized for the current month are not issued until next month.
- 3. Cases discontinued this month, effective the last day of preceding month or earlier.
- 4. On Forms AG and BL 237, recipients in a public medical institution, with no allowance from OAS or ANB funds for personal and incidental expenses, who left the hospital (or licensed ward or bed) or who died too late in the month for the warrant for that month to be issued.

Note: The entry in Item 13b should be an actual count of cases.

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PUBLIC ASSISTANCE

Statistical

S-126 (Continued)

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Item 14. Discontinued During Month - Enter the total number of cases on which action to discontinue aid was taken during the current month, whether or not aid was paid for the current month and whether the discontinuance was effective at the end of the current month or of a prior month.

Exception: If discontinuance action is taken in the current month to be effective at the end of a future month, report such discontinuance in the month in which the last warrant is paid.

On Forms BL and APSB 237 the entry in this item must equal the sum of Items 14a through 14d. For Form AG 237 the entry in this item must agree with the total number of discontinuances reported on Form AG 253.

Item 14a. (Forms BL, APSB 237) Transfers to Another County - Enter the number of ANB, APSB cases transferred to other counties. Report such cases for the month in which the board of supervisors took action discontinuing aid.

Item 14b. (Form APSB 237) Transfers to ANB - Enter the number of transfers to ANB granted during the month.

Item 14b. (Form BL 237) Transfers to APSB - Enter the number of transfers to APSB granted during the month.

Item 14c. (Forms BL, APSB 237) Discontinued Because of Death - Enter the number of cases discontinued because of death of the recipient.

Item 14d. (Forms BL, APSB 237) All Other Discontinuances - Enter the number of discontinuances for reasons other than transfer or death.

Item 15. Continued to Next Month - Enter the number of cases which are being carried forward to next month. Note that even though a case may have received a warrant this month, it is not to be carried forward to next month if it has been discontinued this month. Item 15 must equal Item 13 minus Item 14.

(W&IC 115, 116)

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PART D - NET EXPENDITURES, FORMS AG 237, BL 237, APSB 237

S-128

In Part D report net expenditures for public assistance during the month; i.e., the amount of aid paid this month, for current and prior month, minus all cancellations, repayments and plus or minus adjustments. Exclude any assistance from county General Relief funds to OAS, ANB or APSB recipients; such assistance is reported in Part D of Form GR 237.

- Item 16. (Forms AG, BL 237) Direct OAS, ANB - report only the net expenditures for recipients whose entire grant is paid directly; i.e., no part is paid in their behalf to a public medical institution.
- Item 16. (Form APSB 237) Total - report the total net APSB expenditures for the month.
- Item 16a. (Form APSB 237) State Share - Enter the amount of APSB reported in Item 16 to be paid from state funds.
- Item 16b. (Form APSB 237) County Share - Enter the amount of APSB reported in Item 16 to be paid from county funds.
- Item 17. (Forms AG, BL 237) OAS, ANB to Recipients in P.M.I. - report the net expenditures for individuals in public medical institutions in whose behalf all or part of the grant is paid to the institution. Include amounts paid to the recipient for personal and incidental expenses as well as amounts paid to the public medical institution by vendor payment or fund transfer. The entry in this item must equal the sum of Items 17a and 17b.
- Item 17a. (Forms AG, BL 237) Allowance to Recipients - Enter this month's net expenditures from OAS, ANB funds to individuals in public medical institutions for personal and incidental expenses.
- Item 17b. (Forms AG, BL 237) Payments to P.M.I. in Recipient's Behalf - Enter this month's net expenditures from OAS, ANB funds to public medical institutions for care of OAS, ANB recipients.
- Item 18. (Forms AG, BL 237) Total OAS, ANB - Enter this month's total net expenditures for OAS, ANB whether paid directly to the recipient or paid to a public medical institution in the recipient's behalf. This amount must equal the sum of the amounts in Items 16 and 17; it must also equal the sum of Items 18a, 18b and 18c (Federal, State and County shares).
- Item 18a. (Forms AG 237, BL 237) Federal Share - Enter the amounts of OAS or ANB reported in Item 18 which will be paid from federal funds.
- Item 18b. (Forms AG 237, BL 237) State Share - Enter the amount of OAS or ANB reported in Item 18 to be paid from state funds.
- Item 18c. (Forms AG 237, BL 237) County Share - Enter the amount of OAS or ANB reported in Item 18 to be paid from county funds.

(W&IC 115, 116)

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PUBLIC ASSISTANCE

S-134

S-134 PART B - APPLICATIONS AND REQUESTS FOR RESTORATION
FORMS CA 237-FG AND CA 237-BHI

S-134

This section is designed to report the movement of applications and requests for restoration.

Column 1, Applications: Report new applications and reapplications, excluding applications for transfer of active ANC cases from another county.

Column 2, Requests for Restoration: Report all requests for restorations received by the county except as noted below for Form CA 237-FG. Exclude restorations granted after discontinuance of one or two months to adjust for an overpayment.

On Form CA 237-FG, report only applications or requests for restoration for an entire family group, i.e., excluding those for an additional child (children) if other members of the family group are receiving ANC or an application or restoration is in process.

Applications or requests for restoration erroneously denied in a prior month shall be included in the current month count as an adjustment in Item 6 and as granted in Item 9a.

Item 6. Brought Forward from Last Month - Compute this figure by adding the entries in Items 6a and 6b and subtracting Item 6c from the resulting figure, i.e., Item 6a plus Item 6b minus Item 6c.

Item 6a. Item 10 Last Month or Explain - Enter the number of applications (Column 1) or requests for restoration (Column 2) previously received which had not been disposed of by the end of last month.

If Item 10 of last month's report was in error, the correct figure shall be shown in Item 6a, and an explanation of the correction shall be made in a footnote.

Item 6b. Transfers from ANC-BHI (ANC-FG), Part B.

On each report use this item for entering the number of applications or requests for restoration that are being transferred from Part B of the other ANC statistical report. Exclude ANC cases that have been receiving ANC in one living arrangement, e.g., boarding home, and are now being moved to the other type, e.g., family group.

Item 6c. Transfers to ANC-BHI (ANC-FG), Part B.

On each report use this item for entering the number of applications or requests for restoration that are being transferred to Part B of the other ANC statistical report. Exclude ANC cases that have been receiving ANC in one living arrangement, e.g., family group, and are now being moved to the other type, e.g., boarding home.

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Item 7.	<u>Received During Month</u> - Enter the number of applications or requests for restoration for ANC received during the current month. In Column 1 this entry must agree with Item 4a. In family groups, if an application or request for restoration was received for a group of children but the children were placed in two or more family budget units by the time aid was granted, show the additional family unit(s) in the report for the month in which ANC is granted, as an inventory adjustment in Item 6a.	
Item 8.	<u>Total</u> - Enter the sum of Items 6 and 7.	
Item 9.	<u>Disposed of During Month</u> - Enter the sum of Items 9a, 9b, and 9c.	
Item 9a.	<u>Granted</u> - Enter the number of applications (Column 1) and requests for restoration (Column 2) which were granted during the current month regardless of the beginning date of ANC. The entry in Column 1 must equal the sum of Items 12a and 12b; the entry in Column 2 must equal Item 12c.	
Item 9b.	<u>Denied</u> - Enter the number of applications (Column 1) and requests for restoration (Column 2) which were denied during the current month.	
Item 9c.	<u>Withdrawn</u> - Enter the number of applications (Column 1) and requests for restoration (Column 2) which were withdrawn by the applicant during the current month. If the application or request for restoration is withdrawn but the county takes denial action, the case is to be reported in Item 9b, Denied.	
Item 10.	<u>Pending at End of Month</u> - Enter the number of pending applications (Column 1) and pending requests for restoration (Column 2), including those received in the current month, which had not been disposed of (granted, denied, or withdrawn) by the end of the current calendar month. This item is equal to Item 8 minus Item 9. (W&IC 115, 116)	

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S-138 PART D - NET EXPENDITURES, FORMS CA 237-FG and CA 237-BHI

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In Part D report net expenditures for ANC during the month, i.e., warrants issued this month, for current and prior months, minus all cancellations, repayments and plus or minus adjustments. On Form CA 237-FG report net expenditures from ANC for children in family groups and on Form CA 237-BHI report net expenditures from ANC for children in boarding homes or institutions.

If the needs of the family budget unit or the child in the boarding home or institution are not met by the maximum participation base and it is necessary to supplement from county funds (i.e., county supplemental aid), include all such amounts whether paid in cash or in kind. If county supplemental aid is paid from "General Relief" funds, do not also report such aid on Form GR 237. Amounts for medical or dental care, etc., are included if they are part of the ANC budget or payment to the boarding home or institution; otherwise they are excluded (See "1" below). Include amounts paid to mismanagement cases whether paid in cash or in kind.

Exclude the following payments:

1. Any medical care, dental care, or hospitalization for ANC cases that is not included in the ANC budget; report such expenditures in Part E of Form GR 237, if the expenditure is paid from General Relief funds.

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PUBLIC ASSISTANCE

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S-138 (Continued)

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2. Payment made from General Relief funds to meet the needs of families or children pending approval of ANC. Report such cases, and payments in Parts B and C of Form GR 237.
3. Payments made from General Relief funds to meet the needs of persons in the household who are not included in the ANC family budget unit. Report such cases, and payments, in Parts B and C of Form GR 237.

Item 16. Total - Enter the sum of Item 16a and 16b.

Item 16a. Amount in Which Federal, State, and County Participate (Form CA 237-FG); Amount in Which State and County Participate (Form CA 237-BHI) - Enter that portion of the ANC payments on which the amount of reimbursement from state funds is computed. The sum of the federal, state, and county shares must equal the entry in this item on Form CA 237-FG. The sum of the state and county shares must equal the entry in this item on Form CA 237-BHI.

Item 16a(1). (Form CA 237-FG) Federal Share - Enter the amount of ANC which will be paid from federal funds, i.e., the federal share of the amount reported in Item 16a. (There is no federal participation for children in boarding homes or institutions.)

Item 16a(1). (Form CA 237-BHI) State Share - Enter the amount of ANC reported in Item 16 to be paid from state funds.

Item 16a(2). (Form CA 237-FG) State Share - Enter the amount of ANC reported in Item 16 to be paid from state funds. Include the state share of assistance to mismanagement cases whether paid in cash or in kind.

Item 16a(2). (Form CA 237-BHI) County Share - Enter the amount of ANC reported in Item 16a to be paid from county funds. Do not include county supplemental aid in this item; report in Items 16b(1) and 16b(2).

Item 16a(3). (Form CA 237-FG) County Share - Enter the amount of ANC reported in Item 16a to be paid from county funds. Include the county share of assistance to mismanagement cases whether paid in cash or in kind. Do not include county supplemental aid in this item; report in Items 16b(1) and 16b(2).

Item 16b. Total Supplemental County Aid in Excess of Participating Base - Enter the sum of Items 16b(1) and 16b(2).

Item 16b(1). Cash - Enter the amount of assistance in cash in excess of the amount on which state participation is based.

Item 16b(2). Kind - Enter the amount of assistance in kind in excess of the amount on which state participation is based.

Note: Amounts reported as County Supplemental Aid on Form CA 237 shall not be included on Form GR 237, Monthly Statistical Report on General Relief.

(W&IC 115, 116)

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S-160 MONTHLY STATISTICAL REPORT ON PUBLIC ASSISTANCE REINVESTIGATIONS
AND APPLICATION DISPOSALS

S-160

This report (Form DPA 10) is designed to provide information on the status of eligibility redetermination of OAS, ANB, APSB, and ANC recipients and on the time lapse between signing and disposal of applications and written requests for restoration for OAS, ANB and ANC.

(W&IC 115, 116)

S-162 PART A - ANNUAL REINVESTIGATIONS

S-162

Part A of this report is designed for reporting the status of annual redeterminations of eligibility, i.e., reinvestigations, for OAS, ANB, APSB and ANC. Separate columns are provided for OAS and ANC; ANB and APSB are combined. All ANC cases are included in the ANC column, whether the children are in family groups or in boarding homes or institutions.

For OAS, ANB and APSB, each individual is counted as a case. For ANC, the case count is determined by the number of Forms CA 200 Part Two which are due or completed under county procedure.

Reinvestigations completed at the time of restoration of assistance are to be included in this report if the required redetermination of eligibility form, i.e., a Form Ag, Bl 206, or CA 200, Part Two, checked "redetermination," is completed and signed on the reverse by the case worker or other authorized person. Such reinvestigations should be reported as due in the month in which the case is restored and as completed in the month in which the caseworker or other authorized person signs the form. However, if the reinvestigation is completed prior to the month the case is restored, count the reinvestigation as due and completed in the month the case is restored.

The calendar month on which the county is reporting statistically will be referred to as the "current month." The month immediately prior to the "current" month will be referred to as "last month."

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These Regulations are designated to become effective.....

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- Item 1. Total Due or Overdue - Enter the sum of Items 1a and 1b.
- Item 1a. Reported as Overdue in Item 3 Last Month - Enter the number of overdue reinvestigations pending from prior months. This entry should agree with Item 3 of last month's report. If Item 3 of last month's report was in error, the correct figure shall be shown in Item 1a and an explanation of the difference shall be made in a footnote, giving the month the reinvestigation was due for each case.
- Item 1b. Becoming Due This Month - Enter the number of reinvestigations which fell due during the current month. Do not report a reinvestigation as due if aid was discontinued during the past year and has not been restored. However, count as due this month reinvestigations completed on cases for which aid is restored this month.
- Item 2. Disposed of this Month - Enter the sum of Items 2a and 2b. Report in these items the disposition of reinvestigations that were due in the current month or overdue from a previous month; reinvestigations completed in advance of the anniversary month are to be shown in Item 4.
- Item 2a. Completed - Enter the number of cases on which the reinvestigations were completed during the current month.
- A reinvestigation is completed when the investigation has been reviewed and/or the Applicant's Affirmation of Eligibility form signed on the reverse by the case worker or other authorized person.
- Item 2b. Canceled By Discontinuance of Case - Enter the number of overdue reinvestigations that were canceled because the cases were discontinued prior to completion of the reinvestigation.
- Item 3. Overdue at End of Month - Enter the difference between Item 1 and Item 2. This entry should also equal the sum of Items 3a and 3b.
- Item 3a. 12 Months or More Overdue - Enter the number of cases whose reinvestigations fell due 12 months ago or more and have not yet been completed. This means that at least two years have elapsed since an investigation of eligibility was last completed on the case.
- Item 3b. Less Than 12 Months Overdue - Enter the total number of pending reinvestigations that have been overdue less than 12 months. This entry must equal the sum of the entries for the various months. Exclude cases overdue 12 months or more; report these in Item 3a.

(Continued)

CALIFORNIA-SDSW-MANUAL-STAT

REVISION 103

Effective August 1, 1956

CONTINUATION SHEET
**F FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE**
(Pursuant to Government Code Section 11380.1)

S-162

PUBLIC ASSISTANCE

Statistical

S-162 (Continued)

S-162

Month Due - Enter a breakdown, by anniversary month and year, of re-investigations still overdue at the end of the current month. The sum of these entries must equal the entry in Item 3b. Reinvestigations overdue 12 months or more are not included, but are shown in Item 3a.

Note: The entry for any given calendar month should be less than or equal to the entry for the same month on last month's report. It should not be greater unless there has been an inventory adjustment to increase the number of overdue reinvestigations brought forward from last month in Item 1a. Whenever the entry for any month (other than the current month) is greater than on last month's report, this increase shall be explained in a footnote.

Item 4. Completed Prior to Anniversary Month - Enter the number of reinvestigations that were completed in advance of the month when due. This will include cases whose anniversary month is to be changed, e.g., to agree with that of a spouse or some other recipient living in the same vicinity, as well as reinvestigations completed ahead of schedule. These should be reported in the month in which the reinvestigation was actually completed, and should not be reported again prior to the next reinvestigation.

Note: This item is completely separate from the other items and does not affect the balancing of the report. Do not include these reinvestigations in any other item(s) on the report.

(W&IC 115, 116)

DO NOT WRITE IN THIS SPACE

CALIFORNIA-SDSW-MANUAL-STAT

REVISION 104

Effective August 1, 1956

CONTINUATION SHEET
F FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

Statistical PUBLIC ASSISTANCE S-164

S-164 PART B, DISPOSAL OF APPLICATIONS AND WRITTEN REQUESTS FOR RESTORATION: LENGTH OF TIME FROM APPLICATION TO DISPOSAL, FORM DPA-10 S-164

This section is designed to report the length of time taken for the eligibility process, measured by the number of days between the date the application, or request for restoration, was signed and the date of official action to dispose of the application or request for restoration. Exclude applications for transfer of aid from another county, automatic restorations and restorations after one or two months discontinuance to adjust for overpayment.

Separate columns provide for reporting the number of applications or requests for restoration for each type of aid. For ANC-FG report the number of families; for ANC-BHI, the number of children.

Item 5. Applications disposed of this month - Enter in each column the number of applications disposed of during the month, either by official action of the board of supervisors or of the delegated agent, or by the applicant if the application was withdrawn. The count in each column should agree with the counts on the "237" reports as follows:

- OAS - Item 9, Column 1, Form AG 237
- ANB - Item 9, Column 1, Form BL 237
- ANC-FG - Item 9, Column 1, Form CA 237-FG
- ANC-BHI - Item 9, Column 1, Form CA 237-BHI

Number of days since application signed - For each application disposed of this month, and reported in Item 5, compute the number of days between the date the application was signed and the date of official action. Segregate the applications disposed of according to the number of days since the application was signed; report in the space provided below Item 5; e.g., 1-30 days; 31-45 days, etc.

(Continued)

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CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

S-164 PUBLIC ASSISTANCE Statistical

S-164 (Continued) S-164

Item 6. Written requests for restoration disposed of this month - Enter the total number of written requests for restoration disposed of this month, i.e., excluding automatic restorations and restorations after discontinuance of one or two months to adjust for overpayment. The entry in each column should agree with the counts on the "237" reports, as follows:

- OAS - Item 9, Column 2, Form Ag 237
- ANB - Item 9, Column 2, Form Bl 237
- ANC-FG - Item 9, Column 2, Form CA 237-FG
- ANC-BHI - Item 9, Column 2, Form CA 237-BHI

Number of days since request for restoration signed - For each request for restoration disposed of this month, and reported in Item 6, compute the number of days between the date the request for restoration was signed and the date of the action disposing of the application. Segregate the requests for restoration disposed of according to the number of days since the request was signed; report in the space provided below Item 6; e.g., 1 - 30 days, 31 - 45 days, etc.

(W&IC 115, 116)

DO NOT WRITE IN THIS SPACE

F CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

Statistical PUBLIC ASSISTANCE S-170

S-170 MONTHLY STATISTICAL REPORT ON REASONS FOR DISCONTINUANCE, S-170
OAS, ANC

The Monthly Statistical Reports on Reasons for Discontinuance, Forms AG 253 and CA 253 FG, are designed to report the reasons cases are closed in OAS and ANC-FG programs.

This information will provide the SDSW and county welfare directors with essential data for interpreting caseload changes and trends and for gauging the effects of administrative policies.

The reports will be compiled from individual authorization documents. Each discontinuance authorization will contain the appropriate code number indicating the reason the case was discontinued.

Manual of Policies and Procedures - Aid to Needy Children, Sec. C-569 provides instructions on coding reasons for discontinuance on ANC authorization documents.

The total number of discontinuances reported on Form AG 253 and Form CA 253 FG each month must agree with the number reported in Item 14 of Form AG 237, and Item 14, Column 1, of Form CA 237 FG, respectively. A discontinuance is to be counted if action to discontinue aid was taken during the current month, whether or not aid was paid for the current month, and whether the discontinuance was effective in the current month or in a prior month. Exception: If discontinuance action is taken in the current month to be effective in a future month, report such discontinuance in the month in which the last warrant is paid.

(Continued)

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CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATION
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(Pursuant to Government Code Section 11380.1)

S-170

PUBLIC ASSISTANCE

Statistical

S-170 (Continued)

S-170

A discontinuance because of transfer to another county is to be counted for the month in which the official action to discontinue aid was taken.

The entry for Code "99," Transfers to Boarding Home and Institutions program, on Form CA 253 FG may be copied from Item 14b, Column 1, Form CA 237 FG, for the current month.

All Boarding Home and Institution discontinuances (including transfers to the Family Group program, Code "79") and partial discontinuances of family cases (i.e., some members discontinued while others continue to receive assistance) are to be excluded from the counts of ANC discontinuances on Form CA 253 FG.

Codes 41-42 have been provided for reporting specific changes in law or policy. Instructions for the use of these codes will be issued by the SDSW when such changes in law or policy occur.

(W&IC 115, 116)

DO NOT WRITE IN THIS SPACE

CALIFORNIA-SDSW-MANUAL-STAT

REVISION 108

Effective August 1, 1956

CONTINUATION SHEET
F FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

Statistical	PUBLIC ASSISTANCE	S-190
S-190 STATISTICAL FORMS	FORM AG 237	S-190
State of California	Department of Social Welfare	
OLD AGE SECURITY MONTHLY STATISTICAL REPORT		COUNTY _____
		REPORT FOR _____ 19 _____

PART A: REQUESTS FOR AID	(Exclude requests for transfer from another county and requests for restoration)	New and Reapplication Requests	
	1. Pending from last month (Item 5 last month or explain).....	_____	
	2. Received during month.....	_____	
	3. Total (1 + 2).....	_____	
	4. Disposed of during month (a + b).....	_____	
	a. Applications signed.....	_____	
	b. Requests withdrawn or canceled (application not signed).....	_____	
	5. Pending at end of month (3 minus 4).....	_____	

PART B: APPLICATIONS AND WRITTEN REQUESTS FOR RESTORATION	(Exclude applications for transfer from another county)	Applications (1)	Written Requests for Restoration (2)
	6. Pending from last month (Item 10 last month or explain).....	_____	_____
	7. Received during month (Column 1 same as 4a).....	_____	_____
	8. Total (6 + 7).....	_____	_____
	9. Disposed of during the month (a + b + c).....	_____	_____
	a. Granted.....	_____	_____
	b. Denied.....	_____	_____
	c. Withdrawn or canceled.....	_____	_____
	10. Pending at end of month (8 minus 9).....	_____	_____

PART C: CASES	11. Brought forward from last month (Item 15 last month or explain).....	_____
	12. Granted during month (sum of a through e).....	_____
	a. New applications... THE SUM OF THESE TWO MUST EQUAL ITEM 9a IN COLUMN 1	_____
	b. Reapplications.....	_____
	c. Restorations - written request (same as 9a, Col. 2).....	_____
	d. Restorations - written requests not required.....	_____
	e. Transfers from another county.....	_____
	13. Total cases (sum of 11 and 12; also a + b below).....	_____
	a. Received OAS (1 + 2 + 3).....	_____
	(1) Entire grant to recipient.....(_____)	_____
	(2) Personal allowance and payment to P.M.I.*...(_____)	_____
	(3) Entire grant to P.M.I.*.....(_____)	_____
	b. Did not receive OAS.....	_____
	14. Discontinued during the month (same as grand total, Form AG 253)....	_____
	15. Continued to next month (13 minus 14).....	_____

PART D: NET EXPENDITURES	16. Direct OAS (Entire grant to recipient).....	\$ _____
	17. OAS to recipients in P.M.I.*.....	_____
	a. Allowance to recipients.....	\$ _____
	b. Payments to P.M.I. in recipients' behalf.....	_____
	18. Total OAS (16 + 17; also a + b + c).....	\$ _____
	a. Federal share.....	_____
	b. State share.....	_____
	c. County share.....	_____

* Public medical institutions

Signature of Reporting Officer _____ Date _____

Form AG 237 Revised July 1956

(Continued)

CALIFORNIA-SDSW-MANUAL-STAT REVISION 109 Effective August 1, 1956

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CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

S-190	PUBLIC ASSISTANCE	Statistical	
S-190 (Continued)	FORM BL 237	S-190	
State of California		Department of Social Welfare	
AID TO NEEDY BLIND MONTHLY STATISTICAL REPORT		COUNTY _____ REPORT FOR _____ 19 _____	
PART A: REQUESTS FOR AID	(Exclude requests for transfer from another county and requests for restoration)		
	New and Reapplication Requests		
	1. Pending from last month (Item 5 last month or explain).....		
	2. Received during month.....		
	3. Total (1 + 2).....		
	4. Disposed of during month (a + b)..... a. Applications signed..... b. Requests withdrawn or canceled (Application not signed).....		
5. Pending at end of month (3 minus 4).....			
PART B: APPLICATIONS AND WRITTEN REQUESTS FOR RESTORATION	(Exclude applications for transfer from another county)		
	Applications (1)	Written Requests for Restoration (2)	
	6. Pending from last month (Item 10 last month or explain)....		
	7. Received during month (Column 1 same as 4a).....		
	8. Total (6 + 7).....		
	9. Disposed of during the month (a + b + c)..... a. Granted..... b. Denied..... c. Withdrawn or canceled.....		
10. Pending at end of month (8 minus 9).....			
PART C: CASES	11. Brought forward from last month (Item 15 last month or explain)		
	12. Granted during month (sum of a through f)..... a. New applications.... THE SUM OF THESE TWO MUST b. Reapplications..... EQUAL ITEM 9a IN COLUMN 1		
	c. Restorations - written requests (same as 9a, Col. 2).....		
	d. Restorations - written request not required		
	e. Transfers from another county.....		
	f. Transfers from APSB.....		
	13. Total cases (sum of 11 and 12; also a + b below)..... a. Received ANB (1 + 2 + 3)..... (1) Entire grant to recipient..... (2) Personal allowance and payment to P.M.I.*..... (3) Entire grant to P.M.I.*.....		
	b. Did not receive ANB		
	14. Discontinued during the month (sum of a through d)..... a. Transfers to another county..... b. Transfers to APSB..... c. Discontinued because of death..... d. All other discontinuances.....		
	15. Continued to next month (13 minus 14).....		
	PART D: NET EXPENDITURES	16. Direct ANB (Entire grant to recipient)..... \$	
		17. ANB to recipients in P.M.I.*..... \$	
		a. Allowance to recipients..... \$	
		b. Payments to P.M.I. in recipients' behalf..... \$	
		18. Total ANB (16 + 17; also a + b + c)..... \$	
a. Federal share..... b. State share..... c. County share.....			

* Public medical institution

Signature of Reporting Officer
Form BL 237, Revised July 1956

Date

(Continued)

CALIFORNIA-SDSW-MANUAL-STAT REVISION 110 Effective August 1, 1956

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

Statistical	PUBLIC ASSISTANCE	S-190
S-190 (Continued)	FORM APSB 237	S-190
State of California	Department of Social Welfare	
AID TO PARTIALLY SELF-SUPPORTING BLIND MONTHLY STATISTICAL REPORT		COUNTY _____ REPORT FOR _____ 19____

PART A: REQUESTS FOR AID	(Exclude requests for transfer from another county and requests for restoration)	New and Reapplication Requests	
	1. Pending from last month (Item 5 last month or explain).....		
	2. Received during month.....		
	3. Total (1 + 2).....		
	4. Disposed of during month (a + b).....		
	a. Applications signed.....		
	b. Requests withdrawn or canceled (application not signed).....		
	5. Pending at end of month (3 minus 4).....		
PART B: APPLICATIONS AND WRITTEN REQUESTS FOR RESTORATION	(Exclude applications for transfer from another county)	Applications (1)	Written Requests for Restoration (2)
	6. Pending from last month (Item 10 last month or explain).....		
	7. Received during month (Column 1 same as 4a).....		
	8. Total (6 + 7).....		
	9. Disposed of during the month (a + b + c).....		
	a. Granted.....		
	b. Denied.....		
	c. Withdrawn or canceled.....		
	10. Pending at end of month (8 minus 9).....		
PART C: CASES	11. Brought forward from last month (Item 15 last month or explain).....		
	12. Granted during month (sum of a through f).....		
	a. New applications..	THE SUM OF THESE TWO MUST EQUAL ITEM 9a IN COLUMN 1	
	b. Reapplications....		
	c. Restorations - written request (same as 9a, Col. 2)...		
	d. Restorations - written request not required.....		
	e. Transfers from another county.....		
	f. Transfers from ANB.....		
	13. Total cases (sum of 11 and 12; also a + b below).....		
	a. Received APSB.....		
	b. Did not receive APSB.....		
	14. Discontinued during the month (sum of a through d).....		
a. Transfers to another county.....			
b. Transfers to ANB.....			
c. Discontinued because of death.....			
d. All other discontinuances.....			
	15. Continued to next month (13 minus 14).....		
PART D: NET EXPENDITURES	16. Total (a + b).....	\$ _____	
	a. State share.....		
	b. County share.....		

Form APSB 237-Revised July 1956	Signature of Reporting Officer _____	Date _____
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(Continued)

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

S-190 PUBLIC ASSISTANCE Statistical
S-190 (Continued) FORM CA 237-FG S-190

State of California Department of Social Welfare
AID TO NEEDY CHILDREN-FAMILY GROUPS
MONTHLY STATISTICAL REPORT
COUNTY _____
REPORT FOR _____ 19__

PART A: REQUESTS FOR AID	(Exclude intercounty transfers and requests for restoration)		FAMILIES	
	1. Pending from last month (Item 5 last month or explain).....			
	2. Received during month.....			
	3. Total (1 + 2).....			
	4. Disposed of during month (a + b).....			
	a. Applications signed.....			
	b. Requests withdrawn or canceled(application not signed)....			
	5. Pending at end of month (3 minus 4).....			

PART B: APPLICATIONS AND REQUESTS FOR RESTORATION	(Exclude intercounty transfer applications)		FAMILIES	
			Applications (1)	Requests for Restoration (2)
	6. Brought forward from last month (a plus b minus c).....			
	a. Item 10 last month or explain.....			
	b. Transfers from ANC-BHI, Part B.....			
	c. Transfers to ANC-BHI, Part B.....			
	7. Received during month (Col. 1 same as 4a).....			
	8. Total (6 + 7).....			
	9. Disposed of during month (a + b + c).....			
	a. Granted.....			
b. Denied.....				
c. Withdrawn.....				
10. Pending at end of month (8-9).....				

PART C: CASES	(In Col. 1 all items required; Col. 2 required items are 12, 13a and 14)		FAMILIES (1)	CHILDREN (2)
	11. Brought forward from last month (Item 15 last month or explain).....			
	12. Granted during month (sum of a through f).....			
	a. New applications..	IN COL 1 THE SUM OF THESE		
	b. Reapplications....	MUST EQUAL 9a, COL. 1.		
	c. Restorations - written request (9a, Col. 2).....			
	d. Restorations - overpayment adjustments.....			
	e. Transfers from ANC-BHI.....			
	f. Transfers from another county.....			
	13. Total cases (Sum of 11 and 12; also a + b).....			
	a. Received ANC.....			
	(1) Family budget units with adult(s).....			
	b. Did not receive ANC.....			
	14. Discontinued during month (a + b; also total on CA 253).			
	a. Transfers to ANC-BHI.....			
b. All other reasons.....				
15. Continued to next month (13 - 14).....				

PART D: NET EXPENDITURES	16. Total (sum of Items 16a and 16b).....		\$
	a. Amount in which federal, state and/or county participate (1 + 2 + 3).....		
	(1) Federal share.....		
	(2) State share.....		
	(3) County share.....		
	b. Total supplemental county aid in excess of participating base (1 plus 2).....		
	(1) Cash.....		
	(2) Kind.....		

Signature of Reporting Officer _____ Title _____ Date _____
Form CA 237-FG, Revised July 1956

(Continued)

DO NOT WRITE IN THIS SPACE

(Continued)

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIO
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

S-190	PUBLIC ASSISTANCE	Statistical
S-190 (Continued)	FORM GR 237	S-190
State of California	GENERAL RELIEF MONTHLY STATISTICAL REPORT	Department of Social Welfare
COUNTY _____	REPORT FOR THE MONTH OF _____	19 _____

A. REQUESTS FOR GENERAL RELIEF DURING MONTH	CASES	PERSONS
1. Total Requests for Financial Assistance during month.....		
B. GENERAL HOME RELIEF CASES		
2. Continued from last month (Item 6 last month).....		
3. Total added during month (Item 3a plus 3b).....		
a. New: Never previously received General Home Relief.....		
b. Reopened: Previously received General Home Relief.....		
4. Total active during month (Item 2 plus 3; also Item 4a plus 4b)..		
a. Received General Home Relief (Same as Item 7, Col. 1 & 2)....		
b. Received no General Home Relief.....		
5. Total discontinued during month (Sum of Items 5a through 5l).....		
a. Death.....		
b. Employment or increased earnings.....		
c. Support from relatives or friends.....		
d. Other change in economic circumstances.....		
e. Change in law or agency policy.....		
f. Refusal to comply with agency policy.....		
g. Excess property.....		
h. Admitted to institution.....		
i. Receipt of another type of public assistance.....		
j. Returned to legal residence.....		
k. Lost contact.....		
l. Other (specify).....		
6. Continued to next month (Item 4 minus 5; Item 2 next month).....		

C. OBLIGATIONS INCURRED FOR GENERAL HOME RELIEF: DETAIL FOR CASES REPORTED UNDER ITEM 4a, PART B					
Recipients	Cases (1)	Persons (2)	OBLIGATIONS INCURRED DURING MONTH		
			Cash (3)	Kind (4)	Total (5)
7. Total Recipients (7a plus 7b; same as 4a)			\$	\$	\$
a. Family cases.....			XXXXXXXXXXXX	XXXXXXXXXXXX	
b. One-person cases.....			XXXXXXXXXXXX	XXXXXXXXXXXX	

D. SUPPLEMENTATION OF OAS, ANB, AND APSB (Do not include amounts elsewhere in this or other statistical reports)	Persons	Obligations
8. Supplemental aid from county funds to OAS Recipients.....		\$
9. Supplemental aid from county funds to ANB or APSB Recipients.....		\$
E. OTHER GENERAL RELIEF FROM COUNTY INDIGENT FUND (Exclude persons or obligations reported in Parts B, C, or D, or aid from sources other than indigent fund)		
10. Boarding home and institutional care of children (Exclude ANC cases)...		\$
11. Boarding home and institutional care of adults (Exclude OAS, ANB, or APSB)...		\$
12. Hospitalization (Including ambulance service from GR funds).....		\$
13. Medical and dental care.....		\$
14. Burials.....		\$
15. Short-term care (3 days or less).....		\$
16. Transportation costs to place of residence.....		\$
17. Other (specify).....		\$

Signature of Reporting Officer
Form GR 237, Revised July 1952

Title

Date

(Continued)

CALIFORNIA-SDSW-MANUAL-STAT

REVISION 114

Effective August 1, 1956

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CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

Statistical	PUBLIC ASSISTANCE	S-190
S-190 (Continued)	FORM AG 253	S-190
State of California FORM AG 253	Department of Social Welfare	
OLD AGE SECURITY	COUNTY _____	
Monthly Statistical Report on REASONS FOR DISCONTINUANCE	REPORT FOR THE MONTH OF _____, 19__	

REASON FOR DISCONTINUANCE	CODE	NUMBER OF CASES
Grand Total: Cases discontinued during the month (as reported in Item 14 on Form Ag 237) ..		
Death.....	99	
Transfers to other counties.....	89	
Adjustment for overpayment.....	69	
Sub-Total: Cases discontinued for reasons listed below (Codes 01 through 50).....		
INCOME REASONS:		
Earnings of Recipients:		
-County assisted in job placement.....	01	
-Recipient found own employment.....	02	
Earnings or other resources of spouse.....	03	
Contributions from adult children.....	04	
Monthly income from real property.....	05	
Recurring lump sum income.....	06	
Old Age and Survivors Insurance.....	07	
Railroad retirement benefit.....	08	
Military pension or benefit.....	09	
Civil pension or annuity.....	10	
Other income.....	11	
PROPERTY REASONS:		
Increased real property holdings.....	20	
Increased assessment of real property.....	21	
Refuses to comply with real property utilization requirements.....	22	
Increased personal property holdings.....	23	
OTHER REASONS:		
Admitted to public TB or mental hospital or in other public medical institution because diagnosed as TB or psychotic.....	29	
Patient in county infirmary (custodial care).....	31	
Inmate of other public institution.....	32	
Accepted for ANB or APSB.....	33	
Loss of state residence.....	34	
Whereabouts unknown.....	35	
Discontinuance requested by recipient; no reason given for request.....	36	
Offset discontinuance for overpayment.....	40	
Change in state law or policy (Do not use unless instructed by SDSW):	41	
	42	
Other.....	50	

Signature of reporting officer	Title	Date
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Submit two copies to Bureau of Research and Statistics, SDSW, 722 Capitol Avenue, Sacramento, not later than the 18th of the month following the report month.

Form Ag 253, Revised July 1956

DO NOT WRITE IN THIS SPACE

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

S-190PUBLIC ASSISTANCEStatistical

S-190 (Continued)FORM CA 253 FG S-190

State of CaliforniaDepartment of Social Welfare
FORM CA 253 FG

AID TO NEEDY CHILDREN - FAMILY GROUPS
Monthly Statistical Report on
REASONS FOR DISCONTINUANCE

COUNTY
REPORT FOR THE MONTH OF, 19

REASON FOR DISCONTINUANCE	CODE	NUMBER OF CASES
GRAND TOTAL: Cases Discontinued During the Month (as reported on Form CA 237).....		
Transfers to other Counties.....	89	
Transfers to Boarding Homes and Institutions.....	99	
Adjustment for Overpayment.....	69	
Sub-Total: Cases Discontinued for Reasons Listed Below (Codes 01 thru 50).....		
INCOME REASONS:		
Support from stepfather.....	01	
Contributions from absent father.....	02	
Earnings of father living in home.....	03	
Earnings of mother:		
--County assisted in job placement.....	04	
--Found own employment.....	05	
Earnings of dependent children.....	06	
Contributions from other persons.....	07	
Old Age and Survivors Insurance.....	08	
Military service benefits.....	09	
Unemployment or disability insurance benefits.....	10	
Other income.....	11	
OTHER REASONS:		
Excess real or personal property.....	20	
Father no longer incapacitated.....	21	
Absent father returned.....	22	
Child reached 18th birthday.....	23	
Child, aged 16 or over, ineligible under Sec. 1500, W.&I.C.....	24	
Child an inmate of a public institution.....	25	
Loss of state residence.....	26	
Whereabouts unknown.....	27	
Refusal to cooperate with law-enforcement officers.....	28	
Refusal of reasonable employment or vocational rehabilitation.....	29	
Refusal to provide essential information.....	30	
Offset discontinuance for overpayment.....	40	
Change in law or policy (Do not use unless instructed by SDSW):		
	41	
	42	
Other.....	50	

Signature of reporting officerTitleDate

Submit two copies to Bureau of Research and Statistics, SDSW, 722 Capitol Avenue, Sacramento, not later than the 18th of the month following the report month.

Form CA 253 FG, Rev. July 1956

(Continued)

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

Statistical PUBLIC ASSISTANCE S-190
S-190 (Continued) FORM DPA 10 S-190

State of California
PUBLIC ASSISTANCE REINVESTIGATIONS
AND APPLICATION DISPOSALS
Monthly Statistical Report
Department of Social Welfare
COUNTY _____
REPORT FOR _____ 19 _____
Submit in Duplicate to Bureau of Research & Statistics, SDSW

PART A ANNUAL REINVESTIGATIONS	1. Total due or overdue (1A + 1B).....	OAS	ANB and APSE	ANC (FG & BHI)	
	A. Reported overdue in Item 3 last month.				
	B. Becoming due this month.....				
	2. Disposed of this month (2A + 2B).....				
	A. Completed.....				
	B. Canceled by discontinuance of case....				
	3. Overdue at end of month (1 minus 2; 3A + 3B)....				
	A. 12 months or more overdue.....				
	B. Less than 12 months overdue (sum of entries below, by months due).....				
		(January 19_....			
	(February 19_....				
	(March 19_....				
	(April 19_....				
	(May 19_....				
	(June 19_....				
	(July 19_....				
	(August 19_....				
	(September 19_..				
	(October 19_....				
	(November 19_...				
	(December 19_...				
	4. Completed prior to anniversary month (Do not include in Item 2A).....				

PART B DISPOSAL OF APPLICATIONS AND WRITTEN REQUESTS FOR RESTORATION: LENGTH OF TIME FROM APPLICATION TO DISPOSAL*	(EXCLUDE APPLICATIONS FOR TRANSFER FROM ANOTHER COUNTY)		OAS	ANE	ANC-FG (Families)	ANC-BHI (Children)
	5. Applications disposed of this month (equals sum of entries below; also Item 9, Col. 1, of 237 reports).....					
	Number of days (1 - 30 days.....					
	since application (31 - 45 days....					
	signed (46 - 60 days....					
	(61 days or more.					
	6. Written requests for restoration disposed of this month (Equals sum of entries below; also Item 9, Col. 2, of 237 reports).....					
	Number of days (1 - 30 days.....					
	since request for (31 - 45 days....					
	restoration signed (46 - 60 days....					
	(61 days or more.					

* Number of days between date of application and date of official action (granted or denied); if withdrawal, between date of application and date withdrawn by applicant.

Signature of Reporting Officer _____ Date _____
FORM DPA-10, Revised July 1956

CALIFORNIA-SDSW-MANUAL-STAT REVISION 117 Effective August 1, 1956

DO NOT WRITE IN THIS SPACE

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATION
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

The following sections are to be repealed effective August 1, 1956:

- | | | |
|-------|---|-------|
| S-160 | MONTHLY REPORT ON PUBLIC ASSISTANCE REINVESTIGATIONS
OAS, ANB, APSB, ANC | S-160 |
| | Repealed | |
| S-162 | SECTION A, FORM DPA 10 | S-162 |
| | Repealed | |
| S-164 | SECTION B, ANALYSIS OF CASES FOR WHICH REINVESTIGATION IS
OVERDUE LESS THAN 12 MONTHS, FORM DPA 10 | S-164 |
| | Repealed | |
| S-166 | SECTION C, ITEM 4, REINVESTIGATIONS COMPLETED PRIOR TO
ANNIVERSARY MONTH, FORM DPA 10 | S-166 |
| | Repealed | |

DO NOT WRITE IN THIS SPACE

GEORGE K. WYMAN
DirectorGOODWIN J. KNIGHT
GovernorSTATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE616 K STREET
SACRAMENTO 14
June 26, 1956

DEPARTMENT BULLETIN NO. 516B (ANB)

TO: COUNTY WELFARE DEPARTMENTS
COUNTY BOARDS OF SUPERVISORS
COUNTY AUDITORSSubject: Certification by Public Medical
Institution of Patient StatusSection VII of Department Bulletin No. 516 (Certification by Public
Medical Institution of Patient Status) is revised to read as follows:VII. CERTIFICATION BY PUBLIC MEDICAL INSTITUTION OF PATIENT STATUS

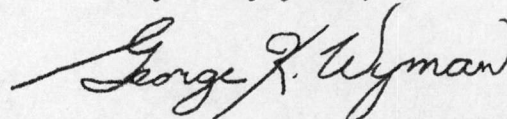
A completed Certification of Patient Status in a Public Medical Institution is required for each ANB recipient for each month during which the recipient is a patient in a public medical institution. This certification is used by the county in its determination that payment is to be made on behalf of the recipient to the institution as authorized for medical care rendered an eligible patient-recipient. It is to be completed by a responsible official of the public medical institution and submitted to the county welfare department after the close of the month for which care was rendered, for inclusion in the case record for the individual or cross reference in the case record to such certification filed elsewhere in the county welfare offices.

Either of the two following methods of certification shall be used:

1. A separate completed form (AB 236 A) shall be submitted for each patient after the close of each month for whom medical care was rendered during the full month
- or
2. Form AB 236 B shall be submitted after the close of each month listing the patients for whom medical care was rendered during the full month.

This revision is necessary to enable county welfare departments to meet transmittal deadlines on claims and statistical reports.

Very truly yours,

George K. Wyman
Director

Attachments

These Regulations are designated to become effective AUG 1 '56

State of California

Department of Social Welfare

CERTIFICATION OF PATIENT STATUS IN A PUBLIC MEDICAL INSTITUTION

To: County Welfare Department

Name of Institution _____

Operated by Unit of Government

County _____

County No. _____ State No. _____

This is to Certify, That _____

Name of Recipient-Patient	Home Address
---------------------------	--------------

received care as a patient in this medical institution during the month of _____
19__, at a cost of \$ _____. His medical status was as follows:

- is ☐
1. Tuberculosis or The patient in this institution
Psychosis is not ☐
because of tuberculosis or psychosis
2. Ward and building (if Patient is hospitalized as designated below:
only one building specify Ward _____
ward only which is and
licensed by the State Building _____
Dept. of Public Health as _____
a medical ward or unit)

OR

3. Patient was discharged
or left voluntarily ☐ _____
Date
4. Patient died ☐ _____
Date

Signature _____

Title _____

Date _____

Department of Social Welfare

(Name of Institution)

(Unit of Government)

(County)

MEDICAL CARE PROVIDED DURING _____, _____.

(Month) (Year)

1	2	3	4		5	6
NAME AND ADDRESS OF RECIPIENT - PATIENT	STATE NUMBER	COUNTY NUMBER	LOCATION OF PATIENT		COST OF CARE (PER MO.)	REMARKS
			BUILDING	WARD		

I certify that the above-listed persons have received medical care as patients in this medical institution during the full calendar month indicated and are not in this institution because of tuberculosis or psychosis.

(Signature)

(Date)

(Title)

CONTINUATION SHEET
FOR FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

W&IC 115, 116

GEORGE K. WYMAN
Director

GOODWIN J. KNIGHT
Governor

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14
June 27, 1956

DEPARTMENT BULLETIN NO. 516C (ANB)

TO: COUNTY WELFARE DEPARTMENTS
COUNTY BOARDS OF SUPERVISORS
COUNTY AUDITORS

Subject: Vendor Payments to Public
Medical Institutions

Section III of Department Bulletin No. 516 (Eligibility to ANB of Patients in Public Medical Institutions) is revised to read as follows:

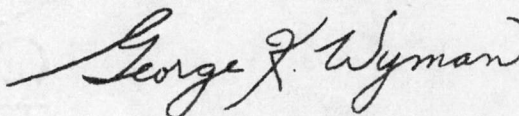
III. AMOUNT OF AID TO BE GRANTED ELIGIBLE PATIENTS

The amount of aid to be granted an eligible patient who has no income is the maximum (\$95 a month).

The amount of aid to be granted an eligible patient who has income is dependent upon the amount of income. However, consideration is given to the total need of the patient which includes the cost of medical care in the institution, special need for medical care as defined in Manual Section B-615, if not provided by the medical institution, plus \$15 for personal and incidental expenses. (It is recognized that the basic need for incidental expenses is \$15.50. However, the law sets a maximum of \$15 a month for personal and incidental expenses for those persons who are patients in a public medical institution.)

Income received by the public medical institution on behalf of the recipient but not available to the recipient for the reason that it was owed to the public medical institution rather than to the recipient is to be disregarded in making distribution of the grant.

Very truly yours,



George K. Wyman
Director

These Regulations are designated to become effective AUG 1 '56

CONTINUATION SHEET
FOR FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

W&IC 115, 116

GEORGE K. WYMAN
Director

GOODWIN J. KNIGHT
Governor

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14
June 28, 1956

DEPARTMENT BULLETIN NO. 527 (STAT)

TO: COUNTY WELFARE DEPARTMENTS
COUNTY BOARDS OF SUPERVISORS
COUNTY AUDITORS

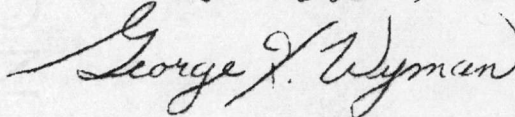
Subject: Revision of Coding of
Reason for Discontinuance
on Forms AG 278

Effective July 1, 1956, statistical reporting on "Direct" and "Vendor" cases in Old Age Security will be combined. In coding reasons for discontinuance on Form AG 278 and reporting on Form AG 253, therefore, the following codes will not be used for cases discontinued after June 30, 1956:

- Code 96. Transferred from OAS (Direct) to OAS (Vendor)
- Code 97. Released - Transferred from OAS (Vendor) to OAS (Direct)
- Code 98. Death - Transferred from OAS (Vendor) to OAS (Direct)

Attached is a list of current codes and definitions for recording (Form AG 278) and reporting (Form AG 253) reasons for discontinuance for Old Age Security cases discontinued on or after July 1, 1956.

Very truly yours,



George K. Wyman
Director

Attachment

These Regulations are designated to become effective AUG 1 '56

CONTINUATION SHEET
FOR FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE

(Pursuant to Government Code Section 11380.1)

INSTRUCTIONS FOR CODING REASONS FOR DISCONTINUANCE ON FORM AG 278

Whenever an OAS case is discontinued, a code to indicate the reason for the discontinuance is entered on Form AG 278 (Authorization to Pay, Deny, Suspend or Discontinue Old Age Security) in the box provided for that purpose in Item 16. If several reasons apply, the code for the one which occurred most recently is entered. If several reasons occur simultaneously, the code for the applicable reason appearing first on the list of codes is entered.

These "reasons for discontinuance" codes will be tallied and summarized to provide the data for the monthly report on Form AG 253, Reasons for Discontinuation of Old Age Security. The usefulness of the report depends on the accuracy of the codes entered on Forms AG 278 and care should be taken to enter the correct code for each case.

Code reasons for discontinuance as follows:

Code 99. Death

Code 89. Transferred to Another County: Aid is discontinued because the recipient has moved to another county and aid is being furnished by the other county.

Code 69. Adjustment for Overpayment: Aid of an eligible recipient is discontinued for the first and/or second month following overpayment to adjust for same.

Income Reasons

Codes 01 and 02. Earnings of Recipient: Include earnings from new employment and increased earnings. Also include earnings from self-employment. Include income derived from roomers and/or boarders in the household, if the recipient is responsible for management of the household. If the spouse is responsible for management of the household, use Code "03."

Code 01. County Assisted in Job Placement: County made placement referral to an agency or employer or provided employment counselling.

Do not use this code for discontinuances in which the county's participation in finding employment was only casual or incidental. In such cases use Code "02."

Code 02. Recipient Found Own Employment.

Code 03. Earnings or Other Resources of Spouse: Earnings (including earnings from self-employment) or separate income of the recipient's husband or wife. Examples are rental of the spouse's separate property or income derived from roomers and/or boarders in the household when the spouse is responsible for management of the household. Include marriage or remarriage and assumption of support by spouse.

CONTINUATION SHEET
**FOR FILING ADMINISTRATIVE REGULATIONS
 WITH THE SECRETARY OF STATE**
 (Pursuant to Government Code Section 11380.1)

- Code 04. Contributions From Adult Children: Support in cash or in kind.
- Code 05. Monthly Income From Real Property: Such as the net rental of property owned by the recipient or his share of net income from rental of community property.
- NOTE: Do not use this code for "recurring lump-sum income" (see Sec. A-212.7). Such cases should be reported under Code "06."
- Code 06. Recurring Lump-Sum Income: Income received at intervals of two months or more, in the same or in varying amounts, as defined in Sec. A-212.7.
- Code 07. Old Age and Survivors Insurance: OASI benefits paid in the recipient's name. Allocations from a spouse's benefits should be reported under Code "03."
- Code 08. Railroad Retirement Benefits: Benefits paid in the recipient's name. Allocations from a spouse's benefits should be reported under Code "03."
- Code 09. Military Pension or Benefit: Veterans' benefits, serviceman's dependent benefits or any other benefits resulting from service in the armed forces by the recipient or a relative.
- Code 10. Other Pension or Annuity: A monthly benefit, pension or annuity from any public or private source other than those listed for Codes "07" through "09" above. Use Code "06" if this income recurs at intervals of two months or more.
- Code 11. Other Income: Income from sources other than those listed above, e.g., contributions from friends, unemployment or disability insurance, income from personal property, etc.

Property Reasons

- Code 20. Increased Real Property Holdings: Additions to the real property of recipient and/or spouse have caused the net assessed value of total real property to exceed that permitted under the OAS law.
- Code 21. Increased Assessment of Real Property: The assessed value of the recipient's and/or spouse's real property has been increased so that the net assessed value exceeds the legal maximum, but there has been no increase in holdings.
- Code 22. Refuses to Comply with Real Property Utilization Requirements: The recipient refused to utilize his real property holdings or to offer his property for sale if such sale is necessary as required by Sec. A-133.56.

CONTINUATION SHEET
FOR FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

- Code 23. Increased Personal Property Holdings: The net value of the recipient's personal property or of the combined recipient's and spouse's personal property has increased beyond the legal maximum.

Public Institution Reasons

- Code 29. Admitted to Public TB or Mental Hospital or in Other Public Medical Institution Because Diagnosed as TB or Psychotic: Recipient admitted to a public institution maintained for the exclusive purpose of treating persons suffering from tuberculosis or mental disease or recipient admitted to any public medical institution as a result of a diagnosis of tuberculosis or psychosis.
- Code 31. Patient in County Infirmary (Custodial Care): i.e., for shelter and maintenance only. Include patients in a county hospital if for custodial care only.
- Code 32. Inmate of Other Public Institution: e.g., county jail, state prison, federal institution (including medical), etc.

Other Reasons

- Code 33. Accepted for ANB or APSB.
- Code 34. Loss of State Residence.
- Code 35. Whereabouts Unknown: All efforts to locate have failed.
- Code 36. Discontinuance requested by recipient; no reason given for request.
- Code 40. Offset discontinuance for overpayment.
- Codes 41 - 42. Change in State Law or Policy: These codes are to be used only for reporting specific changes in state law or policy. Do not use unless special instructions have been issued by the SDSW.
- Code 50. Other: Reasons other than those listed above. Every effort should be made to classify a reason for discontinuance under one of the specific codes. Use this code only when no other reason is applicable.

GEORGE K. WYMAN
DirectorSTATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14
June 29, 1956

DEPARTMENT BULLETIN NO. 528 (STAT)

TO: COUNTY WELFARE DEPARTMENTS
COUNTY BOARDS OF SUPERVISORS
COUNTY AUDITORSSubject: Sample Study of Old Age
Security Case Load

Section A-1605 provides for periodic sample studies in lieu of continuous reporting on the Old Age Security case load sample. (Reporting on the intake sample remains on a continuous basis.)

The initial "point-in-time" study will include sample cases active in June 1956 and will reflect their circumstances as of June. The required information shall be reported on Form Temp 376 AG in accordance with "Instructions for Form Temp 376 AG, Sample Study of Old Age Security Case Load, June 1956," on all cases (except vendor cases) receiving Old Age Security in June 1956 whose state numbers end in "22."

The information requested on the schedule generally follows the pattern of the Old Age Security Permanent Sample Schedule (Form AG 251) in use for a number of years. With the 1957 legislative session in mind, several new items have been added. These items are expected to be of considerable interest to legislators and relate to length of time on aid (Section C), special needs (Sections F and G) - particularly the detail on special medical needs - and responsible relatives (Section E).

When the results of this study have been tabulated and analyzed they will be summarized in a published report which will be available to agencies and individuals interested in the OAS program.

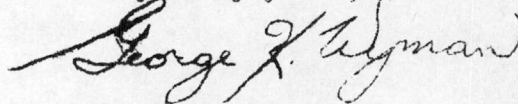
A supply of schedules and instructions will be forwarded to each county about August 1.

Questions regarding the study and schedule should be directed to the Bureau of Research and Statistics, State Department of Social Welfare.

The completed schedules shall be sent to the Bureau of Research and Statistics, State Department of Social Welfare, 722 Capitol Avenue, Sacramento 14, by August 31, 1956.

This bulletin shall cease to be effective after October 31, 1956.

Very truly yours,

George K. Wyman
Director

Attachments

These Regulations are designated to become effective AUG 1 1956

CONTINUATION SHEET
OR FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

Instructions for Items

III. County - Enter the name of the county.

Name - Enter the name of the recipient.

State Number - Enter the state number.

County Number - Enter the county number (if any).

Section A-- General Characteristics

Item 1. Ancestry and Sex (Check one) - Check the one appropriate designation. For all persons of Mexican descent (including Mexican-Indian), check "Mexican." "Indian" refers to American-Indian.

Item 2. Year of Birth - Enter the year in which the recipient was born.

Item 3. Total Years in California - Enter the total years recipient had lived in California as of the date of this schedule.

Item 4. Citizenship - Check the appropriate designation.

Item 5. Marital Status - In addition to marital status of the recipient, this item identifies married couples who are living together as well as the recipient status of the spouse.

Check "Never married" if the recipient has never been married.

Check "Divorced" if an interlocutory divorce decree is in effect as well as for final divorce and for annulment.

Check "Separated" if the recipient is married, but not living with the spouse. If the separation appears to be temporary due to illness, employment, etc., check one of the codes "5" through "9" under "Married, Living with Spouse."

Item 6. If Married, Enter Age of Spouse - Enter age of spouse in completed years.

Item 7. Physical and Mental Condition (Check one) - Selection of the appropriate item to be checked will be based on the best judgment of the caseworker, utilizing information in the case record and his or her own knowledge and observation. Although medical information should be used to whatever extent it is available, statements made by the recipient and members of his family, and observations made by the caseworker, will in many instances afford the only bases for reaching a decision.

Bedridden - Check if recipient is confined to his bed because of chronic illness or infirmity. Do not check if person is confined to his bed because of temporary illness.

Not Bedridden, But Requiring Considerable Care from Others, Due Primarily to Physical Condition - Check if recipient is so feeble or so incapacitated by chronic illness or infirmity of a primarily physical nature as to require assistance in eating, dressing, and moving about his home. When such assistance is required as a result of both physical and mental infirmity, a judgment will be necessary as to whether the care is required principally because of the physical or the mental condition.

CONTINUATION SHEET
**FILING ADMINISTRATIVE REGULATIONS
 WITH THE SECRETARY OF STATE**
 (Pursuant to Government Code Section 11380.1)

Not Bedridden, But Requiring Considerable Care from Others, Due Primarily to Mental Condition - Check if recipient requires close observation or supervision for the protection of himself or other persons, or assistance in activities of daily living such as eating, dressing, etc., as a result of mental condition. Do not check if care required is necessary primarily as a result of physical infirmity.

Able to Care for Self - Check if recipient is able to eat, dress, and move about his home without assistance, and requires only nominal care or supervision, or none at all.

- Item 8. Living Arrangements - (Check all applicable items) These entries should reflect the usual living arrangements of the recipient. Hence temporary living arrangements of the recipient or temporary absence of the spouse due to illness, employment, etc., should be disregarded.

Code 0 - Check this code if recipient lives alone in a house, apartment, flat, hotel, rooming house, etc., preparing his own meals or eating elsewhere.

For Codes 1 - 4 check all applicable items (e.g., if recipient lives with spouse and adult children check both Codes 1 and 2).

- Item 9. Type of Dwelling - Check the one code that most nearly describes the recipient's usual place of abode.

- Item 10. Place of Residence

City or Town - Check appropriate codes 1 through 3 for cities and towns listed on attachment "1950 Population of All Incorporated and of Unincorporated Places of 1,000 or More in California."

Suburban Area Near a City - Check this code if recipient lives in a suburban community not listed in the attachment, and which adjoins a city or town. These will be principally subdivisions, i.e., housing developments and other community developments; but may include other rural sections which are substantially populated. (e.g., farm lands now used as homesites.)

Rural - Check this response if recipient does not live in a city, town, or suburban area as defined above.

- Item 11. Guardianship - Check the appropriate response. (If recipient has a guardian, the type of guardianship and whether the guardian is a public official, will be shown on Form DPA 5.)

Section B - Resources of Recipient

- Item 1. Personal Property of Recipient - Report only the recipient's separate holdings and his share of any community property. If unmarried, make all entries in the column headed "separate property."

Enter the amounts used in determining eligibility.

AUG 1 '56

These Regulations are designated to become effective.....

CONTINUATION SHEET
R FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

None -- If the recipient has no personal property, check "none."

Cash -- Enter the value of cash on hand, in the bank, in postal savings accounts, etc.

Market Value of Securities - Enter the current market value of securities (stocks, mortgages, notes, etc.).

Life Insurance - Enter the net cash surrender value of all life insurance policies.

Burial Insurance or Trust; Interment Plot - Enter the value of burial insurance, burial trust or similar funds, and interment plots.

Motor Vehicle(s) - Enter the value of automobiles, trucks, motorcycles, etc. as determined by Manual Section A-135.1. Exclude the value of motorized farm equipment and house trailers used as dwellings. Such farm equipment should be reported as "Other" personal property. House trailers used as dwellings are real property.

Other - If an item of personal property fits none of the other listed categories, specify its type and enter its value in "Other."

Total, Both Columns - Enter the sum of the entries in the two columns.

Item 2. Personal Property of Married OAS Recipient and Spouse, Living Together and Spouse Receiving or Applying for OAS - Enter total net value of separate and community property combined.

Item 3. Real Property - Report on all real property of recipient and spouse. Include the spouse's separate property unless the couple are not living together.

(1) Nature - Note that for purposes of Old Age Security, any place of abode is considered real property. A house trailer or houseboat should, therefore, be checked "recipient's or spouse's home," if it is used by the recipient as a dwelling.

(2) Value

Total Assessed Value - Enter the total county assessed value of all real property reported under Item 10A.

Total Encumbrances - Enter the total amount of encumbrances against the real property reported under Item 10A.

Net Assessed Value - Enter the difference between the total assessed value and total encumbrances. If the encumbrances are greater, enter "0."

Item 4. June Income Considered in Determining Grant (As Known in August) - Check "no income" if the recipient had no income. Disregard casual and inconsequential income. (See Manual Section A-211.) If the recipient had regularly recurring lump sum income received at intervals greater than one month, prorate in accordance with Manual Section A-212.7.

CONTINUATION SHEET
**FOR FILING ADMINISTRATIVE REGULATIONS
 WITH THE SECRETARY OF STATE**
 (Pursuant to Government Code Section 11380.1)

Generally, the sources listed are self-explanatory. However, the following points should be made:

- (1) If OASI was paid in the recipient's name but was shared with the spouse, enter under "Old Age and Survivors Insurance" only the portion used in computing the recipient's grant. Enter the full amount of the recipient's monthly OASI benefit in Item 5.

If OASI was allocated to the recipient from the spouse, report the amount allocated as a "contribution from spouse."

- (2) If the recipient received net income from rental of real property (in which he has an ownership interest), show his share as "net income from real property." On the other hand, net income from subrentals and boarders should be reported as earnings.
- (3) Contributions from adult children are to be reported according to whether they are made in cash or in "kind," e.g., free rent.
- (4) If income was received from any source other than those listed, report under "Other" and specify the source.

In the space provided, enter the total amount of all income reported.

Item 5. If a Portion of Recipient's OASI Benefit was Allocated to Spouse, Enter Full Amount of Benefit Here - Item self-explanatory.

Section C - Effective Dates of Approvals and Discontinuances of OAS.

This section records the effective dates (month and year) aid was granted and discontinued, from the first time the case was opened until the present. From these data it will be possible to determine the net time the recipient has been on aid.

Under "Approvals" enter the effective date of the most recent approval (restoration or reapplication) working back to the first approval. Exclude approvals following discontinuance to adjust for overpayment.

Under "Discontinuances" enter the effective dates of all discontinuances (beginning with the most recent). Exclude discontinuances to adjust for overpayment.

If additional space is needed continue the chronological record on a sheet of paper and staple it to the schedule.

Section D - Responsible Relatives

Col. 1 - Name of Responsible Relative: Enter first name of the spouse and of each adult child of the recipient. If recipient has no spouse and no adult children, write "none" on the first line of Column 1. (No other entries in Section D are required in such cases.)

Col. 2 - Relationship to Recipient: Enter code showing the relative's relation to recipient.

AUG 1 '56

These Regulations are designated to become effective.....

CONTINUATION SHEET
**FOR FILING ADMINISTRATIVE REGULATIONS
 WITH THE SECRETARY OF STATE**
 (Pursuant to Government Code Section 11380.1)

- Col. 3 - Location: Enter code showing the relative's present whereabouts.
- Col. 4 - Marital Status: Enter code showing relative's marital status.
- Col. 5 - Number of Dependents: Enter number of dependents (including the relative) as reported in Item E., Form Ag 225.
- Col. 6 - Source of Income: Enter code showing sources of income received by relative.
- Col. 7 - Gross Monthly Income: Enter the sum of amounts reported as gross income in Items A-1, B-1 and C-1 on Form Ag 225 for this relative.
- Col. 8 - Net Income (Adjusted): Enter the net amount of monthly income (adjusted) as reported in Item D-6 on Form Ag 225.
- Col. 9 - Amount of Liability: Enter the amount of liability as fixed by the board of supervisors or delegated agent.
- Cols. 10 and 11 - Contribution in June 1956 (As known in August)
- Col. 10 - Amount: Enter amount of contribution made by relative in June 1956.
- Col. 11 - Nature: Enter code showing type or nature of contribution reported in Column 10.
- Col. 12- Liability Status: Enter the appropriate code showing whether or not the relative is liable, and, if not liable, the reason therefor.
- Col. 13- Reduced Liability-Unusual Expenses: Was the amount of liability reduced because of unusual expenses as reported in Item J, Form AG 225? Check "Yes" or "No."

Section E - Financial Summary

Entries in this section should reflect need, income and the amount of aid to which the recipient was entitled for June. Disregard adjustments in June for prior month overpayments and retroactive payments for prior month underpayments.

In some instances the initial determinations for June were, or are, subject to modification due to later information. The latest available information (i.e., in August) with respect to June is the information to be recorded. Thus the amount reported as "Amount of Aid to Which Entitled" may differ from the grant as actually paid for June.

- Item 1. Type of Grant - Check "flat grant" if recipient had no income, or if all of his income was deducted from \$85.

Check "special need" if recipient had income and had special needs considered in determining amount of grant.

CONTINUATION SHEET
FILING ADMINISTRATIVE REGULATIONS
WITH THE SECRETARY OF STATE
(Pursuant to Government Code Section 11380.1)

- Item 2. Total Need - Enter total need as finally determined for June for special need cases. This will be the amount of total special need allowed (Section F) plus \$85. For flat grant cases enter a dash (--).
- Item 3. Total Income - Enter the recipient's total income for June (See Item 4, Section B).
- Item 4. Amount of Aid to Which Entitled - Enter the difference (not to exceed \$85) between "Total Need" and "Total Income" (Item 2 minus Item 3).
- Item 5. Unmet Need - (Make no entry; for state use.)

Section F - June Special Needs As Known in August (Complete on special need cases only.)

Special needs tend to fluctuate and there is frequently a lag in the time the information gets to the agency. Whenever later information on special needs modifies the original determination for June, use the latest information available (i.e., in August).

Cost - Enter the actual cost of each special need on appropriate line. The amount to be entered is the total cost irrespective of any ceiling imposed by regulation. The amount included should be the recipient's share, when the cost of an item is shared.

Allowed - Enter the amount allowed for each special need on appropriate line. The amount allowed is the amount used in computing total needs, even though recipient's resources may be insufficient to meet all of the needs fully.

Reason for Allowance - Enter code showing reason special need was included, i.e., "health reasons," "other reasons," etc.

The entry opposite "Total Special Needs" is the sum of the entries in the column headed "Allowed."

Section G - Detail: June Medical Care Special Needs as Known in August

Cost - Enter the actual cost of each medical special need on appropriate line. The amount to be entered is the total cost irrespective of any ceiling imposed by regulation.

Allowed - Enter the amount allowed for each medical special need on appropriate line. The amount allowed is the amount used in computing total needs, even though recipient's resources may be insufficient to meet all of the needs fully.

The entries opposite "Total for Medical Care" are the sums of the entries in the columns headed "Cost" and "Allowed." They should be the same as the entries shown opposite "Medical Care" in Section F.

AUG 1 '86

These Regulations are designated to become effective

DO NOT WRITE IN THIS SPACE

State of California

OLD AGE SECURITY CASE LOAD SAMPLE SCHEDULE

Department of Social Welfare

SECTION A. General Characteristics

1. Ancestry & Sex (Check one):

Male Female
White. 1 ☐ 2 ☐
Negro. 3 ☐ 4 ☐
Mexican. 5 ☐ 6 ☐
Indian. 7 ☐ 8 ☐
Other (Specify Below) 9 ☐ 0 ☐

2. Year of Birth: _____

3. Total Years in California: _____

4. Citizenship (Check One):
Is a U. S. Citizen. 1 ☐
Is not a U. S. Citizen. 2 ☐

5. Marital Status (Check One):

Never Married 1 ☐
Widowed 2 ☐
Divorced (Incl. Annulment) 3 ☐
Separated 4 ☐

Married, Living with Spouse:-
Spouse Not Receiving
Public Assistance 5 ☐

Spouse Receiving OAS. 6 ☐

Spouse Rec. ANB or APSB 7 ☐

Spouse Rec. Gen. Relief 8 ☐

Spouse A Member of an ANC
Family Budget Unit. 9 ☐

6. If Married,
Enter Age of Spouse _____

7. Physical & Mental Condition
of Recipient (Check One):

Bedridden. 1 ☐
Not Bedridden, but Requiring
Considerable Care From Others
Due Primarily to -
Physical Condition 2 ☐
Mental Condition. 3 ☐
Able to Care for Self. 4 ☐

8. Living Arrangements (Check
All Applicable Items):
Alone 0 ☐

With Spouse 1 ☐

With Adult Children 2 ☐

With Friends or Other Relat. 4 ☐

Other Arrangement X ☐

9. Type of Dwelling (Check One):

House 1 ☐

Apartment or Flat 2 ☐

Hotel. 3 ☐

Rooming House-

With Hskpg. Facilities. 4 ☐

Without Hskpg. Facilities 5 ☐

Boarding House. 6 ☐

Licensed Boarding Home
or Rest Home. 7 ☐

Institution. 8 ☐

Other X ☐

10. Place of Residence (Check One):

City of 50,000 or More. 1 ☐

City of 2,500 to 49,999 2 ☐

City or Town Less Than 2,500. 3 ☐

Suburban Area Near a City 4 ☐

Rural 5 ☐

11. Guardianship (Check One):

No Guardian 0

Guardian of Recipient's Person Only. 1 ☐ 2 ☐ 3 ☐

Guardian of Recipient's Estate Only. 4 ☐ 5 ☐ 6 ☐

Guardian of Both Person and Estate 7 ☐ 8 ☐ 9 ☐

SECTION B - Resources of Recipient

1. Personal Property of Recipient (Enter Net Values):

	Separate Property	Share of Community Property
None (Check, if Applicable)	☐	☐ 0

Cash (On Hand, in Bank, etc.) \$ _____ \$ _____ 1

Securities (Stocks, Bonds, etc.) \$ _____ \$ _____ 2

Life Insurance (Net Cash Surrender Value
of all Policies) \$ _____ \$ _____ 3

Burial Insurance or Trust; Interment Plot \$ _____ \$ _____ 4

Motor Vehicle(s) \$ _____ \$ _____ 5

Other (Specify _____) \$ _____ \$ _____ 6

Total, Both Columns. \$ _____

2. Personal Property of Married OAS Recipient and Spouse, Living Together,
and Spouse Receiving or Applying for OAS (Enter Total Net
Value of Separate and Community Property Combined) \$ _____

3. Real Property

(1) Nature (Check Each Applicable Item):

No Real Property 0 ☐

Home 1 ☐

Other Improved Property. 2 ☐

Unimproved Property. 4 ☐

(2) Value (Complete Each Item): Total Assessed Value. \$ _____

Total Encumbrances. \$ _____

Net Assessed Value. \$ _____

County _____ State No. _____

Name _____ County No. _____

4. June Income Considered in Determining Grant
(as known in August):

No Income (Check if Applicable). ☐

Use and Occupancy of Home. \$ _____

OASI (See Also Item 5) \$ _____

Contributions From Spouse. \$ _____

Contributions From Adult Children: In Cash. \$ _____

In Kind. \$ _____

Pension or Annuity \$ _____

Net Income From Real Property. \$ _____

Recipient's Net Earnings \$ _____

Friend or Nonresponsible Relative. \$ _____

Other (Specify _____). \$ _____ X

Total Monthly Income \$ _____

5. If a Portion of Recipient's OASI Benefit was
Allocated to Spouse, Enter the Full
Amount of the Benefit Here. \$ _____

SECTION C - Effective Dates of Approvals and
Discontinuances of OAS (Begin With the Latest
Action. Exclude Discontinuances Adjusting
for Overpayments):

Approvals		Discontinuances	
Month	Year	Month	Year

DO NOT WRITE IN THIS SPACE

SECTION D - Responsible Relatives of This Recipient

(Report on all responsible relatives, regardless of location or contributing status; make an entry for each relative in each column; use coded entries as needed)

1 NAME OF RESPONSIBLE RELATIVE	2 (CODE) RELATIONSHIP TO RECIPIENT	3 (CODE) LOCATION	4 (CODE) MARITAL STATUS	5 NUMBER OF DEPENDENTS	6 (CODE) SOURCE OF INCOME	7 GROSS MONTHLY INCOME	8 ADJ. NET INCOME	9 AMOUNT OF LIABILITY	10 11 (CODE) CONTRIBUTION, JUNE 1956*		12 (CODE) LIABILITY STATUS	13 REDUCED LIABI- LITY - UNUSUAL EXPENSES	
									AMOUNT	NATURE		YES	NO
1.						\$	\$	\$	\$				
2.													
3.													
4.													
5.													
6.													
7.													
8.													
9.													
10.													
11.													

C O D E S

COLUMN 2
RELATIONSHIP
TO RECIPIENT

COLUMN 3 LOCATION

COLUMN 4 MARITAL STATUS

COLUMN 6 SOURCE OF INCOME

COLUMN 11 NATURE OF CONTRIBUTION

COLUMN 12 LIABILITY STATUS

Husband. . . .1
Wife2
Son. . . .3
Daughter . .4

Same Home
Recipient's. . . .1
Relative's2
Elsewhere in California. .3
Outside of California. .4
Unknown.V

Never Married.1
Married
Living with Spouse . . .2
Not Living with Spouse .3
Divorced (Inc. Annul.) .4
Widowed.5
Unknown.V

Salary Only.1
Self-employed Only . . .2
Salary & Self-employed .3
Other.4
Unknown.V

None.0
Cash Only1
Kind Only2
Cash and Kind3

Liable.1
Not Liabe
Out of State.2
Net Income Below Scale. . .3
Unusual Expenses.4
Release from Obligation
(Civil Code Sec. 206.5) . .5
Other6

* As known in August

CONTINUATION SHEET
R FILING ADMINISTRATIVE REGULAT
WITH THE SECRETARY OF STATE
5
(Pursuant to Government Code Section 11380.1)

DO NOT WRITE IN THIS SPACE

SECTION E - June Financial Summary as known in August

(Complete all items):

Flat Grant. . . .1 ☐

1. Type of Grant

(Check one):

Special Need. . .2 ☐

2. Total Need. \$ _____

3. Total Monthly Income. _____

4. Amount of Aid to Which Entitled. _____

5. Unmet Need (Make no entry; for state use). _____

SECTION F - June Special Needs as known
in August

Special Needs (Enter Amounts & Code)

Item of Need	Cost	Allowed	Reason* Allowed (Code)
Food	\$ _____	_____	_____
Special Diet.	_____	_____	_____
Restaurant.	_____	_____	_____
Rent - Including Utilities	\$ _____	_____	_____
- Excluding Utilities	_____	_____	_____
Home Owned	_____	_____	_____
Utilities.	_____	_____	_____
Board & Room	_____	_____	_____
Transportation	_____	_____	_____
Clothing	_____	_____	_____
Laundry.	_____	_____	_____
Telephone.	_____	_____	_____
Housekeeping Service	_____	_____	_____
Payments on Debts.	_____	_____	_____
Medical Care (Same as Total, Section G).	_____	_____	_____
Other (Specify): _____	_____	_____	_____
Total Special Need	_____	_____	XXXX

*Codes for Reason Special Needs Allowed: Health Reason.1
Other Reason2
Health & Other Reason. .3

SECTION G - Detail: June Medical Care Special Needs as known in August

State No. _____ County No. _____

Item of Need	Cost	Allowed
Services		
Physician or Surgeon.	\$ _____	\$ _____
Other Practitioner.	_____	_____
Dentist	_____	_____
Nursing	_____	_____
Home Nursing.	_____	_____
X - Ray & Other Laboratory.	_____	_____
Facilities		
Private Hospital.	_____	_____
Private Clinic.	_____	_____
Nursing Home.	_____	_____
Supplies		
Drugs	_____	_____
Other Medical Supplies.	_____	_____
Prosthetics		
Eye Glasses	_____	_____
Hearing Aid & Batteries	_____	_____
Artificial Limbs.	_____	_____
Dentures.	_____	_____
Other (Specify): _____	_____	_____
Prepaid Medical, Surgical and/or Hospital Insurance.	_____	_____
Other (Specify): _____	_____	_____
Total for Medical Care (Same as entry in Section F).	_____	_____

Completed by _____

Date _____